

REQUEST FOR PROPOSAL

Professional Consultant Services For BREC'S BATON ROUGE ZOO MASTER PLAN



**Solicitation No: 175
RFP Issue Date: June 12, 2018**

**Proposal Opening Date: Thursday, July 12, 2018
Proposal Opening Time: 11am CT**

BREC
Parks and Recreation Commission
for the Parish of East Baton Rouge
6201 Florida Boulevard
Baton Rouge, LA 70806

Project Management Team:
BREC Planning & Engineering Department

(06/12/2018)

NOTE TO PROPOSERS:

- Submit your original and required copies of the Request for Proposal as outlined within this document, with all required information as your Proposal.
- Retain a copy of your Request for Proposal Response, and a complete copy of this RFP, for your records.

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7. Baton Rouge Zoo Site Feasibility Study (October 2015)

REQUEST FOR PROPOSAL
for
PROFESSIONAL CONSULTANT SERVICES FOR
BREC'S BATON ROUGE ZOO MASTER PLAN
RFP No. 175

PART I. ADMINISTRATIVE AND GENERAL INFORMATION

1.1 Statement of Purpose

The Recreation and Park Commission for the Parish of East Baton Rouge (BREC) is issuing this Request for Proposals (RFPs) from qualified, experienced providers of zoo planning, architectural and design services for the development of a new facility Master Plan that will guide future strategic direction and development of BREC's Baton Rouge Zoo (BRZ). The purpose of this RFP is to determine which planning firms offer the best fit in developing BRZ's future direction and growth. Based on our review of the RFP responses, BRZ intends to select the top three (3) qualified firms for interviews.

New designs and ideas for the Master Plan are encouraged with attention to our vision and mission of engaging guests in fun and innovative experiences, and inspiring discovery and appreciation of the Earth's wildlife.

The Zoo is located in the largest park owned and operated by the Recreation and Park Commission of the Parish of East Baton Rouge (BREC). Greenwood Park includes the 18-hole Dumas Golf Course, the 9-hole J.S. Clark Memorial Golf Course, a disc golf course, a 16-acre lake, a modern lakefront multi-purpose community center, nature trail, playgrounds, splash pads, lighted tennis courts, a large park district maintenance complex, and a 48-year-old, 147-acre zoo. Greenwood Park is also a Land and Water Conservation Fund Park. To improve and provide better synergy with Greenwood Park's amenities, BREC will be issuing a concurrent ¹RFP for master planning major improvements to Greenwood Park.

This RFP is intended to establish the specifications, terms and conditions governing the selection of a firm to provide zoo planning, architectural and design services to BRZ for the development of a new BRZ site Master Plan document. All proposals shall be in the form and format specified in the RFP section entitled 'Submittal Format and Procedures'.

1.2 Background:

With a population of over 440,000, East Baton Rouge Parish is the most populous parish in Louisiana and includes the cities of Baton Rouge (the state capital and parish seat), Baker, Central, and

¹ BREC will be issuing a separate RFP for a new master plan for Greenwood Park. BREC expects the Zoo master plan team to work with the team selected for the Greenwood planning process to ensure a well-integrated, holistic, and synergistic design of the two facilities.

Zachary. The highest population densities in East Baton Rouge Parish are found within the City of Baton Rouge and the southern portion of the parish. The City of Baton Rouge is the Capital City of Louisiana. It has a warm climate almost year-round and is located right off the Mississippi River. It has a competitive job market in engineering and health care, is home to Louisiana State University, and Southern University.

Economy

The East Baton Rouge Parish economy is diverse, which helps to ensure stability. It is the largest employment center in the nine-parish metropolitan statistical area. The unemployment rate in the Baton Rouge region has remained lower than both the national and state averages. The largest employers in East Baton Rouge Parish are:

- State and local governments
- Education, particularly higher education due to the presence of LSU, Southern University, and Baton Rouge Community College
- The petrochemical industry
- The medical industry

Major transportation routes, which include the I-10 and I-12 corridors and the Mississippi River, provide the City of Baton Rouge and the entire parish with key routes to transport goods, services, and people.

Demographics

According to the 2010 U.S. Census, the median household income for East Baton Rouge Parish was \$46,356, which is below the national median household income at \$50,502. Additionally, per capita income for East Baton Rouge is \$24,591, below the U.S. at \$26,708. At the bottom end of the income scale, the percentage of households making less than \$25,000 in East Baton Rouge Parish is higher than the United States, at 25%. At the top of the spectrum, East Baton Rouge Parish has 19% of households at or above \$100,000, lower than the United States, at 21%.

The United Health Foundation ranked Louisiana 49th overall in its 2017 state health rankings. Over 35% of Louisiana's population was obese in 2017, the fourth highest percentage of all states. Louisiana also ranks 43rd in terms of physical activity, with about 29% of the population being physically inactive—nearly double the inactivity rate (16%) of the most physically active state, Utah. The lack of physical activity presents an opportunity, and a challenge for the Zoo.

The African American population of the Parish is concentrated primarily north of U.S. Highway 190 (Florida Boulevard). Over half of the African American population of East Baton Rouge lives in this area. The Caucasian population is heavily concentrated below Florida Boulevard, primarily in the southern part of the parish. Among the four incorporated cities in East Baton Rouge Parish, the City of Baton Rouge has the closest balance between African Americans and Caucasians. However, there is still a gap of 17 percentage points between the two races. The nearby City of Baker is overwhelmingly African American at 72 percent. The Baton Rouge Metropolitan Statistical Area is seeing a growth in both Hispanic and Asian, populations.

Greenwood Park / Zoo Context

BREC's Baton Rouge Zoo is located in Greenwood Community Park. The Park is in the extreme northern limits of the City of Baton Rouge. The park's northern edge is bounded by a two-lane highway (Lavey Lane) which serves as the boundary between the City of Baker on its north side and the City of Baton Rouge on the south (Greenwood) side. The park is not well physically integrated into either city due to its surrounding land uses; Heavy Industrial and undeveloped acreage and low-density single family residential. The Baker side is mostly low-density single family residential. The surrounding population of the park is predominantly low income African American. The western side of the park is bounded by LA State Highway 19 which is paralleled by a Canadian Northern rail line. A 400-acre wetland mitigation bank and an industrial park are on the opposite side of Highway 19. Immediately south of the industrial park is an Exxon Plastics plant. Two small bayous meander through the site; Cypress Bayou which flows in and out of the 14-acre lake, and Ash Slough that flows into Cypress Bayou.

A Parish-wide Bike/Pedestrian master plan is also currently underway by BREC and the Louisiana Department of Transportation that will call for greater bicycle and pedestrian connectivity in all areas of the parish including areas surrounding Greenwood and the Zoo.

History

In its 48th year, BREC's Baton Rouge Zoo finds itself on the cusp of a new beginning, an exciting rebirth that will propel it into the future yet retain a core commitment to connect people with animals and inspire in them a deep respect for nature. Recent meetings with prominent business leaders and philanthropists affirmed community support and thorough research by a nationally recognized consulting firm indicates that the vision of a new Zoo can become reality. The following history of the Zoo shows how a foundation laid 48 years ago, can help bring a new Zoo into fruition.

The history of the Baton Rouge Zoo reflects an institution closely connected to the community it serves. Since 1964, when BREC began to seek funds to build a major zoo, citizens of the Baton Rouge metropolitan area have affirmed their support.

Baton Rouge's long history of realizing the importance of a zoo to the community started in the 1930s with a collection of animals displayed in City Park. In the early sixties, local children emptied their piggy banks to help purchase the Zoo's first elephants; and their parents echoed that support by passing a millage providing over three-quarters of a million dollars. The U.S. Department of Interior agreed to provide matching funds, and the Commission hired its first Zoo Director, George Felton. On Easter Sunday 1970, the Zoo opened its doors to the public, and visitors have been streaming in ever since.

Since that Easter morning, the Zoo has worked to maintain a balance between the requirements of its animal collection and the desires of its visitors. In 1977, the Zoo became the first zoo in Louisiana to be accredited by the Association of Zoos and Aquariums (AZA) and has consistently used the framework of AZA as its guide for growth.

Throughout the 1970s, the Zoo continued to build, adding exhibits and expanding its animal collection. Implementation of an Education Program in 1978 emphasized the Zoo's commitment to its mission of education.

In 1986, the Zoo purchased a train, and laid tracks for the popular Cypress Bayou Railroad. The eighties also saw the formation of a support organization, Friends of the Baton Rouge Zoo. FOZ continues to provide a wealth of time and talent in support of the Zoo. The opening of the *KidsZoo* in 1989 provided a place for children to experience farm animals in an interactive environment.

The nineties saw an acceleration of growth in both the physical structure of the Zoo, and also in its commitment to conservation. In 1991, a new Administration Building housed offices for the Zoo director, department heads and curators.

The Zoo's commitment to conservation gained national recognition in the 1990s with the construction of a waste water treatment facility. The unique system handles a daily load of up to 400,000 gallons of water that is processed and reused in designated areas of the Zoo. As we plan for the future, we now must decide if the benefits of this facility outweigh the liabilities.

In 1992, the opening of an Amphitheatre realized the Zoo's goal to accommodate larger groups for its education programs. Also in 1992, FOZ provided a grant to develop a Master Plan for the Zoo which has been continually reviewed and updated. In 1995, the Commission hired its second Director, Paul Price, when Mr. George Felton retired after 25 years.

The Commission hired the Zoo's third, and current, Director Phil Frost in 1998. He immediately realized the need for a department to focus on the comfort of its guests. In 1999, the Guest Services Department was created to oversee visitor amenities. The opening of the Hibernia Pavilion, now Capital One Pavilion, in 1999, provided a venue for the new department to host company picnics, family reunions, and special events. Also in 1999, both *L'aquarium de Louisiane* and *Parrot Paradise* opened with much fanfare.

The Zoo has always maintained the highest standards for its animal collection. The opening of the *George Felton, Jr. Veterinary Hospital* on the Zoo grounds in 1998 ensured state-of-the art veterinary care and equipment for the animals. The Hospital also enhanced the relationship between the Zoo and the LSU Veterinary School. The Zoo and the Veterinary School have worked closely over the years conducting research and behavioral studies on several species. In 2006, the Commission formalized this connection when it approved a Veterinary Training Agreement between the Zoo and LSU.

The new millennium began with the renovation of the *Spectacled Bear* exhibit, and continued with the completion of the second phase of the *South American Cloud Forest* and the opening of a quintessential Louisiana exhibit, *The Otter Cabin*. Also at this time, the growth of the Zoo's Education Department required a move to its own office building next to the Education Classroom.

A generous grant from the Greater Baton Rouge State Fair Association allowed the Zoo to open the *Safari Playground* in the spring of 2005. The grant also funded new animal identification signage

throughout the Zoo. During this time, the Zoo opened *Flamingo Cove* and *Land of the Giants*, featuring Galapagos and Aldabra tortoises.

In 2007 the BREC Commission authorized the Zoo to hire a Horticulture Manager to design and oversee the Zoo's botanical component.

Also, in 2007, the Zoo became the first in Louisiana to hold "*Dreamnight at the Zoo*," an after-hours experience for pediatric cancer patients and their families. The Zoo recently celebrated the 10th anniversary of this invitation-only event which occurs at zoos around the world on the first Friday in June.

The Zoo's most extensive renovation to date began in 2008 with construction of *Conservation Plaza* anchored by a 4,000 lb. granite globe water feature. Also at this time, visitor amenities were addressed including new restrooms, and renovations to the admissions area, train depot, and concession areas. Antiquated pipe fencing was removed throughout the Zoo and replaced with natural barriers.

Spring 2010 heralded the return of tigers to the Zoo with the opening of *Realm of the Tiger*. The Zoo's big cat exhibit had been razed to the ground and species of its cat collection sent to AZA facilities for housing during construction of the new exhibit. *Realm of the Tiger* offers an immersion experience in the culture of Asia and features Malayan and Sumatran tigers, Siamang gibbons, and an open-air Aviary housing birds of Asia.

In November 2010, the Zoo ushered in a new family holiday event with the advent of ZooLights. After-hours visitors follow a path through the Zoo lit by larger than life displays featuring Zoo animals and holiday themes. Carols, ornament crafts and, of course, Safari Santa put guests in the holiday spirit. Talented artists from across the metropolitan area enter paintings and drawings to be displayed at *Art Gone Wild* during ZooLights.

The donation of a giraffe sculpture by a local Zoo supporter became the impetus for *Giraffe Circle*, an esthetically pleasing shaded area for guests to gather. Friends of the Baton Rouge Zoo (FOZ) provided funding for the project which transformed a non-descript area near the giraffe exhibit into a tranquil park setting centered by the refurbished sculpture and featuring a stamped walkway surrounded by landscaping. *Giraffe Circle* has provided a setting for many visitor photo opportunities since its dedication in March 2013.

The Zoo mourned the loss of our 46-year old Asian elephant, Judy, in April 2013 and the subsequent transfer of her companion, Bozie, to the National Zoo. FOZ once again offered support by providing funds to refurbish the former elephant exhibit into a home for Indian rhinos. The exhibit which opened in August 2014 now houses a male and female Indian rhino.

Dedication of the *Atchafalaya Basin* airboat in September 2014 offered visitors the opportunity to "ride" an authentic airboat like those used by enthusiasts on Louisiana's many bayous. A FOZ Board member donated the airboat which was refurbished for its permanent dock on the *Atchafalaya Basin* boardwalk.

In October 2014, FOZ held its first *Brew at the Zoo* fundraising event. This after-hours beer tasting features local craft beer brewers and caterers as well as musical entertainment. Limited tickets sell quickly to this event which is fast becoming one of fall's most popular in the community.

FOZ hired a nationally recognized consulting firm in late 2014 to conduct the first phase of a Feasibility Study to determine support for a Zoo in Baton Rouge. Business and philanthropic leaders interviewed acknowledged the importance of the Zoo to the community and indicated their support to pursue options for the future of the Zoo. The second phase of the study, completed in 2015, recommended location options for the proposed "new Zoo" designed by an international architectural firm specializing in zoos. The third phase researched individual feasibility of the recommended locations. In March of 2018, the BREC Commission voted to keep the Zoo at its current location. The staff was charged with developing a new vision for the Zoo and will bring those plans back to the BREC Commission for approval and implementation.

In recent years, due to outdated exhibits, deteriorated infrastructure, location, and a variety of social and economic conditions, the Zoo has shown a steady decline in visitation. These factors played a major role in the denial of accreditation by the Association of Zoos and Aquariums in March 2018.

Over the past 48 years, the Zoo has served six generations of East Baton Rouge Parish residents. As the Zoo plans how best to serve the next six generations, it continues to fulfill its mission to connect people with wildlife and wild places and provides a quality Zoo to the citizens who support it.

1.3 Project Goals and Objectives

After previous studies that considered moving the Zoo's campus to a different location, the BREC Commission is committed to have the Zoo staying in its current location in its current 147-acre footprint, of which 70+ acres are developed.

BREC's Baton Rouge Zoo is seeking a Master Plan that will:

- Honor the Zoo's rich history and previous efforts, wrapping them into a new and truly innovative future for the Zoo
- Provide state-of-the-art, flexible animal exhibits that encourage uncompromising care for the current animal collection in settings that cause jaw-dropping guest experiences while allowing for significant collection enhancement and change in the future
- Recognize that public programs and offerings have changed to satisfy the higher expectations of the visiting public, including interactive exhibits, face-to-face encounters and increased public engagement opportunities
- Facilitate the Zoo's conservation efforts and place them front and center in the guest experience, clearly demonstrating that BRZ is much more than a place-based institution

- Seamlessly weave education into the Zoo experience, resulting in guests knowing more, feeling more positively toward and doing more for animals with every visit
- Offer a wide range of fun, exciting and inspirational opportunities that will not only encourage future visitation, but also help generate new earned revenue
- Establish an appropriate infrastructure that goes beyond just updating the facility to today's standards and truly anticipates the future needs of the institution's staff, volunteers and guests, allowing the Zoo to stay ahead of increasingly complex AZA and industry standards as much as possible

With these goals in mind, it is anticipated that among a host of other considerations that will be determined during the planning process, the Consultants should consider the following:

- The bulk of the Zoo's infrastructure is antiquated and will certainly need to be upgraded for future development
- The Zoo lacks in climate-controlled space for educational programming, special events and general visitor comfort during inclement weather
- Administration Offices are poorly located to best serve the guests
- Service areas and behind-the-scenes spaces are outdated, inefficient and detract from the team's ability to perform day-to-day functions
- Wastewater treatment facility does not represent best practices in zoological park operations and should be evaluated for our ROI
- There are significant capital improvements that have been completed in the last decade that should be placed in the appropriate context of a plan designed with a 15-20 year scope. These projects include:
 - Entrance Complex
 - Realm of the Tiger
 - Conservation Plaza
- Work with BREC Planning & Engineering Department to determine the best access to the Zoo entrance and parking, which may likely be rerouting vehicles to enter off LA Highway 19 and proceed on a newly developed park drive extension through Greenwood Community Park.
- The BRZ Team has worked hard to establish a spirit of inclusion and excitement that must be considered during the development of the plan. In searching for a Consultant, BRZ is seeking a firm that can honestly and truly manage input from across the organization, embracing the culture of "we will do it right, or we won't do it."

- Additionally, input will be sought from a variety of stakeholders in the community. In many ways, how the master planning process is completed will be as important as the end plan itself.
- Engagement, public participation with charrette/workshops are a key element in this process. Facilitate input into this process by engaging the Zoo's various stakeholders and constituencies which may include Zoo senior management and staff, BREC leadership team, BREC Commissioners, Friends of the Zoo Board of Trustees, FOZ members, BREC Foundation Board, Zoo visitors, elected officials and the community at-large. This engagement may include brainstorming sessions, workshops, community meetings, focus groups, interviews and surveys.

Respondents should be aware that studies, reports, and previous master plans, and major capital improvements were done in recent years for the Zoo and remaining areas of Greenwood Community Park. Briefly, these are as follows:

- Zoo 2020 – The Master Plan (November 2007)
- Friends of the Baton Rouge Zoo – Feasibility Study (May 2015)
- Baton Rouge Zoo – Site Feasibility Study (October 2015)
- Greenwood Community Park Survey (November 2015)
- New Vision, New Experiences – a conceptual facility & site planning report for a new Baton Rouge Zoo (March 2016)
- Parish-Wide Community Survey (June 2016)
- 2006 Greenwood Master Plan
- 2010 Greenwood Site Improvements

1.4 Definitions

- BREC - Recreation and Parks Commission for the Parish of East Baton Rouge
- Consultant - Awarded Proposer on this RFP.
- Contract - Refers to the binding document signed and agreed upon by BREC and the successful Proposer concerning this RFP.
- Department - Department for whom the Request for Proposal is issued.
- Discussions - For the purposes of this RFP presentation, a formal, structured means of conducting written or oral communications/presentations with responsible Proposers who submit proposals in response to this RFP.
- May - The term “may” denotes an advisory or permissible action.
- Must - The terms “must” denotes mandatory requirements.
- Project Manager – Planning & Engineering Department staff member assigned to oversee the project.
- RFP - Request for Proposal
- Selection Committee - Individuals assigned to review the proposals and recommend award.
- Shall - The term “shall” denotes mandatory requirements.
- Should - The term “should” denote desirable.
- State - The State of Louisiana.

- n. Team – Project Management Team assigned to work with the selected Consultant throughout the project.

1.5 RFP and Consultant Selection Timeline

Listed below is the proposed schedule for this process. BREC reserves the right to deviate from these dates. If BREC finds it necessary to alter these dates/times, each Consultant will be notified in writing.

Action	Anticipated Timeline
1. Pre-proposal conference call (non-mandatory)	June 26, 2018: 9am CT
2. Deadline to receive written inquiries	July 3, 2018
3. Deadline to answer written inquiries via addenda	July 9, 2018 11am CT
4. Proposal opening date (deadline for submitting proposals)	July 12, 2018, 11am CT
5. Review period (by Committee via oral discussions with Proposers)	July 12 – August 15
6. Short list notification (3 teams)	July 26, 2018
7. Short list team interviews	August 16, 2018
Action	Anticipated Timeline
8. Interview results and team selection notification	August 21, 2018
9. Commission approval	August 23, 2018
10. Contract Negotiations	September 2018

1.6 Procedures for Submission

Submittals are to be either mailed or hand-delivered and marked:

REQUEST FOR PROPOSALS No. 175

PROFESSIONAL CONSULTANT SERVICES FOR

BREC's Baton Rouge Zoo Master Plan

PROPOSAL OPENING DATE/TIME: Thursday, July 12, 2018; 11am CT

to:

BREC Purchasing Department

6201 Florida Blvd.

Baton Rouge, LA 70806

All submittals shall be received no later than 11am CT, Thursday, July 12, 2018.

BREC assumes no responsibility for delays caused by delivery service. Postmarking by the due date will not substitute for actual receipt.

Faxed or emailed submittals will not be accepted.

Qualifications that do not include the required fee proposal and schedule may be rejected at the option of BREC.

1.7 Submittal Format

Submittals should be organized in a clear and concise manner within a single binder. **Eleven (11) paper copies and one digital copy shall be provided.** The format for the submittal should be as follows:

1. Cover letter – An introductory letter serving as an Executive Summary (maximum of two pages) on firm letterhead indicating name of firm, contact person, address, phone, e-mail, and a short statement summarizing the team composition and strengths of the firm/team as it relates to this project. By signing the letter and/or the proposal, the proposer certifies compliance with the signature authority required in accordance with Louisiana law. The person signing the proposal must be:
 - a. A current corporate officer, partnership member, or other individual specifically authorized to submit a proposal as reflected in the appropriate records on file with the secretary of state; or
 - b. An individual authorized to bind the company as reflected by a corporate resolution, certificate or affidavit; or other documents indicating authority which are acceptable to the public entity. See attached example forms.
2. Personnel Qualifications – Project team organization chart, names, and resumes (1-page maximum per person) of key personnel/team members. Please identify individual roles and responsibilities on the team. The project manager shall be clearly identified. If different consultants will be teaming together or if any portion of the scope of work will be subcontracted, indicate the lead Consultant.
3. References – Please provide names and contact information (phone and email) for three (3) individuals who can speak to firm's past performance on similar projects.
4. Relevant Experience – A description of the firm's relevant experience and capabilities, with description and images of three (3) comparable projects.
 - a. Please include one copy of a sample work product, which may be sent under a separate cover or electronically to reduce printing needs.
 - b. Identify key personnel who participated in each project and describe their roles.
 - c. Provide a reference for each of the projects described. References should be current.
5. Approach and Scope – Provide a written description of your firm's intended approach to the project that demonstrates an understanding of the scope of services, including how the Consultant will complete project milestones, meetings, and deliverables.
 - a. Please provide a project schedule that corresponds to the scope of services.
 - b. The Consultant is encouraged to elaborate and improve on the tasks listed in the RFP.
6. Fee Proposal – Complete Attachment A and attach fee details broken down by phase and by task. Include anticipated elements, hourly rates, estimated hours by person and by task, and travel expenses. Any additional expenses should be noted and defined.

The fee proposal, one original, is required to be submitted in a sealed envelope as a part of this

Request for Proposal.

1.8 Procedures for Questions/Clarifications Prior to Submittal

All inquiries and/or requests for clarification must be submitted by email no later than **July 3, 2018**. Requests for clarification received after this date will be discarded.

Submit questions by email to:

Lori Foreman, BREC Purchasing Department
(225)-272-9200 ext 522
lori.foreman@brec.org

The Request for Proposals (RFP) document is available at www.brec.org/rfp for download.

*Note: BREC has elected to use LaPAC, the state's online electronic bid posting and notification system that is resident on State Purchasing's website <http://wwwprd.doa.louisiana.gov/osp/lapac/deptbids.asp> and is available for vendor self-enrollment. In that LaPAC provides an immediate e-mail notification to subscribing bidders that a solicitation and any subsequent addenda have been let and posted, notice and receipt thereof is considered formally given as of their respective dates of posting dates.

No negotiations, decisions, or actions shall be executed by any bidder as a result of any oral discussions with any BREC employee or BREC Consultant. BREC shall only consider written and timely communications from proposers.

Inquiries shall be submitted in writing by an authorized representative of the proposer, clearly cross-referenced to the relevant solicitation section. Only those inquiries received by the established deadline shall be considered by BREC. Answers to questions that change or substantially clarify the solicitations shall be issued by addendum and provided to all perspective proposers.

Non-Mandatory Pre-Proposal Conference Call / Meeting

Tuesday, June 26, 2018; 9am CT
BREC Administration Building, Rm 2034
6201 Florida Blvd., Baton Rouge, Louisiana, 70806

To join the Conference Call dial: (234) 203-2766 and enter the Participant Access Code: 213-899-698.
To mute your line, press *#6 on your keypad.

Prospective Proposers may participate in the conference to obtain clarification of the requirements of the Request for Proposal and to receive answers to relevant questions. Any firm intending to submit a proposal should have at least one duly authorized representative attend the Pre-proposal Conference.

Although impromptu questions will be permitted, and spontaneous answers will be provided during the conference, the official answer or position of BREC will be stated in writing via addendum.

1.9 Confidential Information, Trade Secrets, and Proprietary Information

The designation of certain information as trade secrets and/or privileged or confidential proprietary information shall only apply to the technical portion of your proposal. Your cost proposal will not be considered confidential under any circumstance. Any proposal copyrighted or marked as confidential or proprietary in its entirety may be rejected without further consideration or recourse.

For the purposes of this procurement, the provisions of the Louisiana Public Records Act (La. R.S. 44.1 et. seq.) will be in effect. Pursuant to this Act, all proceedings, records, contracts, and other public documents relating to this procurement shall be open to public inspection. Proposers are reminded that while trade secrets and other proprietary information they submit in conjunction with this procurement may not be subject to public disclosure, protections must be claimed by the proposer at the time of submission of its Technical Proposal. Proposers should refer to the Louisiana Public Records Act for further clarification.

The Proposer must clearly designate the part of the proposal that contains a trade secret and/or privileged or confidential proprietary information as “confidential” in order to claim protection, if any, from disclosure. The Proposer shall mark the cover sheet of the proposal with the following legend, specifying the specific section(s) of his proposal sought to be restricted in accordance with the conditions of the legend:

“The data contained in pages _____ of the proposal have been submitted in confidence and contain trade secrets and/or privileged or confidential information and such data shall only be disclosed for evaluation purposes, provided that if a contract is awarded to this Proposer as a result of or in connection with the submission of this proposal, BREC shall have the right to use or disclose the data therein to the extent provided in the contract. This restriction does not limit BREC’s right to use or disclose data obtained from any source, including the proposer, without restrictions.”

Further, to protect such data, each page containing such data shall be specifically identified and marked “CONFIDENTIAL”.

Proposers must be prepared to defend the reasons why the material should be held confidential. If a competing proposer or other person seeks review or copies of another proposer's confidential data, the state will notify the owner of the asserted data of the request. If the owner of the asserted data does not want the information disclosed, it must agree to indemnify BREC and hold BREC harmless against all actions or court proceedings that may ensue (including attorney's fees), which seek to order BREC to disclose the information. If the owner of the asserted data refuses to indemnify and hold BREC harmless, BREC may disclose the information.

BREC reserves the right to make any proposal, including proprietary information contained therein, available to the Purchasing Division personnel, or other BREC agencies or organizations for the sole purpose of assisting BREC in its evaluation of the proposal. BREC shall require said individuals to protect the confidentiality of any specifically identified proprietary information or privileged business information obtained as a result of their participation in these evaluations.

If your proposal contains confidential information, you should also submit a redacted copy along with your proposal. If you do not submit the redacted copy, you will be required to submit this copy within

48 hours of notification from Purchasing. When submitting your redacted copy, you should clearly mark the cover as such - "REDACTED COPY" - to avoid having this copy reviewed by a Committee member. The redacted copy should also state which sections or information has been removed."

1.10 Errors and Omissions in Proposal

BREC will not be liable for any error in the proposal. Proposer will not be allowed to alter proposal documents after the deadline for proposal submission, except under the following condition: BREC reserves the right to make corrections or clarifications due to patent errors identified in proposals by BREC or the Proposer. BREC, at its option, has the right to require clarification or additional information from the Proposer.

1.11 Proposal Guarantee (not required)

1.12 Performance Bond (not required)

1.13 Changes, Addenda, Withdrawals

BREC reserves the right to change the calendar of events or issue Addenda to the RFP at any time. BREC also reserves the right to cancel or reissue the RFP.

If the proposer needs to submit changes or addenda, such shall be submitted in writing prior to the proposal opening, signed by an authorized representative of the proposer, cross-referenced clearly to the relevant proposal section, and submitted in a sealed envelope marked as stated in Section 1.4. Such shall meet all requirements for the proposal.

A proposer may withdraw a proposal that has been submitted at any time up to the proposal closing date and time. To accomplish this, a written request signed by the authorized representative of the proposer must be submitted to Purchasing.

1.14 Material in the RFP

Proposals shall be based only on the material contained in this RFP. The RFP includes official responses to questions, addenda, and other material, which may be provided by BREC pursuant to the RFP.

1.15 Waiver of Administrative Informalities

BREC reserves the right, at its sole discretion, to waive administrative informalities contained in any proposal.

1.16 Proposal Rejection

Issuance of this RFP in no way constitutes a commitment by BREC to award a contract. BREC reserves the right to accept or reject any or all proposals submitted or to cancel this RFP if it is in the best interest of BREC to do so.

Failure to submit all non-mandatory information requested may result in BREC requiring prompt submission of missing information and/or giving a lower score in the evaluation of the proposal.

1.17 Ownership of Proposal

All materials (paper content only) submitted timely in response to this request become the property of BREC. Selection or rejection of a response does not affect this right. All proposals submitted timely will be retained by BREC and not returned to proposers. Any copyrighted materials in the response are not transferred to BREC.

1.18 Cost of Offer Preparation

BREC is not liable for any costs incurred by prospective Proposers or Consultants prior to issuance of or entering into a Contract. Costs associated with developing the proposal, preparing for oral presentations, and any other expenses incurred by the Proposer in responding to the RFP are entirely the responsibility of the Proposer, and shall not be reimbursed in any manner by BREC.

1.19 Non-negotiable Contract Terms

Non-negotiable contract terms include but are not limited to taxes, assignment of contract, audit of records, EEOC and ADA compliance, record retention, content of contract/order of precedence, contract changes, governing law, claims or controversies, and termination based on contingency of appropriation of funds (if applicable).

1.20 Taxes

Any taxes, other than state and local sales and use taxes, from which BREC is exempt, shall be assumed to be included within the Proposer's cost.

1.21 Proposal Validity

All proposals shall be considered valid for acceptance until such time an award is made, unless the Proposer provides for a different time period within its proposal response. However, BREC reserves the right to reject a proposal if the Proposer's response is unacceptable and the Proposer is unwilling to extend the validity of its proposal.

1.22 Prime Consultant Responsibilities

The selected Proposer shall be required to assume responsibility for all items and services offered in his proposal whether or not he produces or provides them. BREC shall consider the selected Proposer to be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

1.23 Corporation Requirements

Upon the award of the contract, if the Consultant is a corporation and not incorporated under the laws of the State of Louisiana, the Consultant shall have obtained a certificate of authority pursuant to R.S. 12:301-302 from the Secretary of State of Louisiana prior to the execution of the contract.

Upon the award of the contract, if the Consultant is a for-profit corporation whose stock is not publicly traded, the Consultant shall ensure that a disclosure of ownership form has been properly filed with the Secretary of State of Louisiana.

If services are to be performed in East Baton Rouge BREC, evidence of a current occupational license and/or permit issued by BREC shall be supplied by the successful vendor, if applicable.

1.24 Use of Subconsultants

Each Consultant shall serve as the single prime Consultant for all work performed pursuant to its contract. That prime Consultant shall be responsible for all deliverables referenced in this RFP. This general requirement notwithstanding, Proposers may enter into subconsultant arrangements. Proposers may submit a proposal in response to this RFP, which identifies subcontract(s) with others, provided that the prime Consultant acknowledges total responsibility for the entire contract.

BREC is an equal opportunity employer and encourages the participation of Disadvantaged Business Enterprises (DBE) in all of its projects. Proposers/Prospective Consultants are strongly encouraged to make positive efforts to utilize minority subconsultants for a portion of this project. Proposers are requested to include in their proposal a description of plans for minority participation under this Contract as suppliers or subconsultants.

Information required of the prime Consultant under the terms of the RFP, is also required for each subconsultant and the subconsultants must agree to be bound by the terms of the contract. The prime Consultant shall assume total responsibility for compliance.

1.25 Written or Oral Discussions/Presentations

Written or oral discussions may be conducted with Proposers who submit proposals determined to be reasonably susceptible of being selected for award. BREC reserves the right to enter into an Agreement without further discussion of the proposal submitted based on the initial offers received.

Any commitments or representations made during these discussions, if conducted, may become formally recorded in the final contract.

Written or oral discussions/presentations for clarification may be conducted to enhance BREC understanding of any or all of the proposals submitted. Neither negotiations nor changes to vendor proposals will be allowed during these discussions. Proposals may be accepted without such discussions.

1.26 Acceptance of Proposal Content

The mandatory RFP requirements shall become contractual obligations if a contract ensues. Failure of the successful Proposers to accept these obligations shall result in the rejection of the proposal.

1.27 Evaluation and Selection (see Part III CONSULTANT SELECTION CRITERIA and PROCESS)

1.28 Contract Negotiations

If for any reason the Proposer whose proposal is most responsive to BREC's needs, price and other evaluation factors set forth in the RFP considered, does not agree to a contract, that proposal shall be rejected and BREC may negotiate with the next most responsive Proposer. Negotiation may include revision of non-mandatory terms, conditions, and requirements. Negotiation shall also allow price reductions. The final contract form shall be reviewed by the Purchasing Division and approved by BREC Commission prior to issuance of a purchase order, if applicable to complete the process.

1.29 Contract Award and Execution

BREC reserves the right to enter into an Agreement without further discussion of the proposal submitted based on the initial offers received.

The RFP, any addendums, and the proposal of the selected Consultant will become part of any contract initiated by BREC.

In no event is a proposer to submit its own standard contract terms and conditions as a response to this RFP. The proposer needs to address the specific language in the proposal form and sample contract (Attachments A and C) and submit with their proposal any exceptions or exact contract deviations that their firm wishes to negotiate. The terms for both documents may be negotiated as part of the negotiation process with the exception of contract provisions that are non-negotiable.

If the contract negotiation period exceeds 30 days or if the selected Proposer fails to sign the contract within **seven calendar** days of delivery of it, BREC may elect to cancel the award and award the contract to the next-highest-ranked Proposer.

Award shall be made to the Proposer whose proposal, conforming to the RFP, will be the most advantageous to BREC, price and other factors considered.

BREC intends to award to a single Proposer.

1.30 Notice of Intent to Award

Upon review and approval of the Committee's recommendation for award by Purchasing, Selection of Professionals Committee, and BREC Commission, a Notice of Intent to Award letter to the apparent successful Proposer will be issued. A contract shall be completed and signed by all parties concerned on or before the date indicated in the Schedule of Events. If this date is not met, through no fault of BREC, BREC may elect to cancel the Notice of Intent to Award letter and make the award to the next most advantageous Proposer.

Purchasing shall notify all unsuccessful Proposers as to the outcome of the evaluation process. The evaluation factors, points, Committee member names, and the completed evaluation summary and recommendation report shall be made available to all interested parties after the Intent to Award letter has been issued.

1.31 Debriefings

Debriefings may be scheduled by the participating Proposers after the Intent to Award letter has been issued by contacting Purchasing 72 hours in advance. Contact may be made by phone at 225-272-9200 or E-mail to lori.foreman@brec.org to schedule the debriefing. Debriefings will be for the sole purpose of reviewing with the requesting vendor their own proposal scoring results.

If the requesting vendor wishes to view other file documents, a Public Records request in accordance with R.S 44.1 et. seq. must be submitted.

1.32 Insurance Requirements

Consultant shall furnish BREC with certificates of insurance affecting coverage(s) required by the RFP (see Attachment B). The certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. The certificates are to be received and approved by BREC before work commences. BREC reserves the right to require complete certified copies of all required policies, at any time.

1.33 Subconsultant Insurance

The Consultant shall include all subconsultants as insureds under its policies or shall insure that all subconsultants satisfy the same insurance requirements stated herein for the Consultant.

1.34 Indemnification

Service Provider agrees to indemnify, defend, and hold harmless BREC from any and all losses, damages, expenses or other liabilities, including but not limited to connected with any claim for personal injury, death, property damage or other liability that may be asserted against BREC by any party which arises or allegedly agents in performing its obligations under this Agreement.

Service Provider, its agents, employees and insurer (s) hereby release BREC its agents and assigns from any and all liability or responsibility including anyone claiming through or under them by way or subrogation or otherwise for any loss or damage which Service Provider, its agents or insurers may sustain incidental to or in any way related to Service Provider's operations under this Agreement.

1.35 Fidelity Bond Requirements (not required)

1.36 Payment for Services

The Planning and Engineering Department shall pay Consultant in accordance with the Pricing Schedule set forth in the contract. The Consultant may invoice the department monthly or at other approved intervals at the billing address designated by the department. Payments will be made by BREC within approximately thirty (30) days after receipt of a properly executed invoice, and approval by the department. Invoices shall include the contract or purchase order number, using department and product/service provided. Invoices submitted without the referenced documentation will not be approved for payment until the required information is provided.

1.37 Termination

1.37.1 Termination of this Agreement for Cause-

BREC may terminate this contract for cause based upon the failure of the Consultant to comply with the terms and/or conditions of the Agreement, or failure to fulfill its performance obligations pursuant to this Agreement, provided that BREC shall give the Consultant written notice specifying the Consultant's failure. If within thirty (30) days after receipt of such notice, the Consultant shall not have either corrected such failure or, in the case of failure which cannot be corrected in thirty (30) days, begun in good faith to correct such failure and thereafter proceeded diligently to complete such correction, then BREC may, at its option, place the Consultant in default and the Agreement shall terminate on the date specified in such notice.

The Consultant may exercise any rights available to it under Louisiana Law to terminate for cause upon the failure of BREC to comply with the terms and conditions of this contract; provided that the Consultant shall give BREC written notice specifying BREC failure and a reasonable opportunity for BREC to cure the defect.

1.37.2 Termination of this Agreement for Convenience –

BREC may terminate this Agreement at any time by giving thirty (30) days written notice to the Consultant of such termination or negotiating with the Consultant an effective date.

The Consultant shall be entitled to payment for deliverables in progress, to the extent work has been performed satisfactorily.

1.37.3 Termination for Lack of Appropriated Funds –

Should the RFP result in a multi-year contract, a non-appropriation clause shall be made a part of the contract terms as required by state statutes, allowing BREC to terminate the contract for lack of appropriated funds on the date of the beginning of the first fiscal year for which funds are not appropriated.

If the RFP contract services are funded by grant funds, BREC shall have the right to terminate the contract or any issued Task Order for which funding is terminated.

1.38 Assignment

Assignment of contract, or any payment under the contract, requires the advanced written approval of BREC.

1.39 No Guarantee of Quantities

The quantities referenced in the RFP are estimated to be the amount needed. In the event a greater or lesser quantity is needed, the right is reserved by BREC to increase or decrease the amount, at the unit price stated in the proposal.

Neither BREC nor Department obligates itself to contract for or accept more than their actual requirements during the period of this agreement, as determined by actual needs and availability of appropriated funds.

1.40 Audit of Records

BREC or others so designated by BREC, or other lawful entity shall have the option to audit all accounts directly pertaining to the resulting contract for a period of five (5) years after project acceptance or as required by applicable Local, State and Federal law. Records shall be made available during normal working hours for this purpose.

1.41 Civil Rights Compliance

The Consultant agrees to abide by the requirements of the following as applicable: Title VI and Title VII of the Civil Rights Act of 1964, as amended by the Equal Opportunity Act of 1972, Federal Executive Order 11246, the Federal Rehabilitation Act of 1973, as amended the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Act of 1975, the Consultant agrees to abide by the requirements of the Americans with Disabilities Act of 1990. Consultant agrees not to discriminate in its employment practices, and will render services under this Agreement and any contract entered into as a result of this Agreement, without regard to race, color, religion, sex, sexual orientation, national origin, veteran status, political affiliation, or disabilities. Any act of discrimination committed by Consultant, or failure to comply with these statutory obligations when applicable shall be grounds for termination of this Agreement and any contract entered into as a result of this agreement.

1.42 Record Retention

The Consultant shall maintain all records in relation to this contract for a period of at least five (5) years.

1.43 Record Ownership

All records, reports, documents, or other material related to any contract resulting from this RFP and/or obtained or prepared by Consultant in connection with the performance of the services contracted for herein shall become the property of BREC, and shall, upon request, be returned by Consultant to BREC, at Consultant's expense, at termination or expiration of this contract.

1.44 Content of Contract/Order of Precedence

In the event of an inconsistency between the contract, the RFP and/or the Consultant's Proposal, the inconsistency shall be resolved by giving precedence first to the final contract, then to the RFP and subsequent addenda (if any) and finally, the Consultant's Proposal.

1.45 Contract Changes

No additional changes, enhancements, or modifications to any contract resulting from this RFP shall be made without the prior approval of Purchasing, Superintendent's Office and/or Commission.

Changes to the contract include any change in: compensation; beginning/ending date of the contract; scope of work; and/or Consultant change through the Assignment of Contract process. Any such changes, once approved, will result in the issuance of an amendment to the contract.

1.46 Substitution of Personnel

BREC intends to include in any contract resulting from this RFP the following condition:

Substitution of Personnel: If, during the term of the contract, the Consultant or subconsultant cannot provide the personnel as proposed and requests a substitution, that substitution shall meet or exceed the requirements stated herein. A detailed resume of qualifications and justification is to be submitted to BREC for approval prior to any personnel substitution. It shall be acknowledged by the Consultant that every reasonable attempt shall be made to assign the personnel listed in the Consultant's proposal.

1.47 Governing Law

All activities associated with this RFP process shall be interpreted under applicable Louisiana Law. All proposals and contracts submitted are subject to provisions of the laws of the State of Louisiana including but not limited to L.R.S.38-2211-2296; section 1:701-710 of BREC Code of Ordinances, purchasing regulations; standard terms and conditions; special terms and conditions; and specifications listed in this RFP.

In accordance with the provisions of Louisiana R.S. 38:2212.9 in awarding contracts after August 15, 2010, any public entity is authorized to reject the lowest bid from, or not award the contract to, a business in which any individual with an ownership interest of five percent or more has been convicted of, or has entered a plea of guilty or nolo contendere to any state felony crime or equivalent federal felony crime committed in the solicitation or execution of a contract or bid awarded under the laws governing public contracts under the provisions of Chapter 10 of this Title, professional,

personal, consulting, and social services procurement under the provisions of Chapter 16 of Title 39 of the Louisiana Revised Statutes of 1950, or the Louisiana Procurement Code under the provisions of Chapter 17 of Title 39 of the Louisiana Revised Statutes of 1950.

1.48 Claims or Controversies

Any proposer who believes they were adversely affected by BREC's procurement process or award, may file a protest. It must be submitted in writing to the Director of Finance and specifically state the particular facts which form the basis of the protest and the relief requested. The written protest must be received within seven (7) days from the date the basis of the protest was or should have been known.

BREC will take action on protests within fifteen (15) days of the receipt thereof. BREC may suspend, postpone or defer the proposal process and/or award in whole or in part upon receipt of a protest.

A protest shall be limited to issues arising from the procurement provisions of the contract and state or local law. Protests with regard to basic project design will not be considered.

Protests will be reviewed by a committee appointed by the Superintendent's Office. The decision of the committee regarding the protest will be given to the proposer in writing within ten (10) days after all pertinent information has been considered. The decision of the committee shall be a condition precedent to any other proceedings in connection with a protest and shall be considered the administrative remedy available to the protesting bidder.

1.49 Proposer's Certification of OMB A-133 Compliance

Certification of no suspension or debarment. By signing and submitting any proposal for \$100,000 or more, the proposer certifies that their company, any subconsultants, or principals are not suspended or debarred by the General Services Administration (GSA) in accordance with the requirements in OMB Circular A-133.

A list of parties who have been suspended or debarred can be viewed via the internet at <http://www.sam.gov>

PART II. SCOPE OF WORK / SERVICES

2.1 Scope of Services and Deliverables to be Provided by Consultant

The following describes the Project Scope and Deliverables and a timeline which may be subject to change during Contract negotiations with the selected team. The overall anticipated length of the developing this plan, after team selection, is 10 months.

The scope of services requested includes the following three phases of work:

Phase 1: Site Analysis, Data Gathering and Base Mapping (2 Months)

This will include the gathering of existing site data, inventory and base mapping. BREC's Planning & Engineering and Zoo Departments will provide existing CAD files, reports, previous park project plans and other pertinent information related to prior design and development efforts. The Consultants will meet with Zoo staff and designated BREC leaders to conduct a thorough review and summary analysis of BREC's Baton Rouge Zoo, which includes but is not limited to:

- Visitor amenities, circulation and public spaces
- Visitation & visitor profile
- Attendance, traffic, parking
- Existing concessions and rides
- Existing exhibits
- Analysis of existing Zoo land use
- Analysis of overall Zoo maintenance practices
- Animal care facilities (including hospital, necropsy, quarantine, and holding facilities)
- Existing buildings (including administrative, educational, operational)
- Existing utilities/infrastructure (including domestic water, irrigation, electrical, lighting, drainage, shutoff valves)
- Existing service facilities and service vehicle access
- Current programs
- Current landscaping

Deliverables shall include an analysis report of existing facilities and a plot plan of existing facilities and utilities.

Phase 2: Strategic Business Plan (3 months)

The Consultants will develop a Strategic Business Plan for BREC's Baton Rouge Zoo which includes but is not limited to:

- S.W.O.T. analysis
- Market analysis
- Identify and review trends and recent developments in the zoo community
- Economic impact analysis
- Economic development strategy
- Attendance & operational projections
- Guest services/retail strategies
- Public/private funding partnerships

- Marketing plan
- Operations plan

Deliverables shall include a comprehensive ten-year Strategic Business Plan for BREC's Baton Rouge Zoo. The plan will be a framework based on common themes and values received from the Zoo project team and the public, economic development strategies for the area, revenue generation, recreational trends and needs, program and event opportunities, public/private partnership opportunities, development of new facilities and enhancements to existing facilities.

We will kick-off up to eight (8) 1-hour meetings with key stakeholders and partners including the mayors of Baton Rouge, Central, Zachary, and Baker; meetings with BREC Commissioners, business leaders, community leaders, tourism agency leaders, Friends of The Zoo, and the BREC Foundation. BRZ will facilitate scheduling stakeholder meetings.

In addition, the 1st Public Meeting will be held - Present preliminary findings and initial concepts. The meeting must be designed with creative and effective public engagement methods that inspire and excite the public about the process that result in good participation.

Phase 3: Facility Master Plan (5 Months)

The Consultants will design and develop a Master Plan which includes but is not limited to:

- An immediate \$5M phase of improvements to assist in re-establishing AZA Accreditation to be provided.
- Concept development/key themes
- Animal exhibit plan/organizational theme
- Animal collection plan recommendations
- Innovative ideas linking our animal collection, exhibit, green buildings and gardens to our mission of conservation, education, animal welfare and recreation/family entertainment;
- Education interpretive plan
- Plan for revenue generating facilities, including expanding eatery, retail, rides and other innovative/entertainment activities
- Visitor services and amenities
- Enhancements to landscaping and public pathways
- Facility support services
- Traffic, attendance & parking projections
- Visitor circulation plan
- Vehicular circulation plan
- Service and operations plan
- Proposed utilities upgrade
- Prioritization and phasing of projects
- Statement of probable costs, including escalation

This phase will include up to five (5) 1-2 hour public meetings with key stakeholders and partners including the mayors of Baton Rouge, Central, Zachary, and Baker; meetings with BREC

Commissioners, business leaders, community leaders, tourism agency leaders, Friends of The Zoo, and the BREC Foundation. BRZ will facilitate scheduling stakeholder meetings.

Deliverables shall include a Master Plan that will chart the Zoo's future development for the next 15-20 years. This cohesive conceptual design of the facilities of the entire zoo will include all existing and proposed buildings, animal exhibits and holding spaces, visitor amenities and attractions, guest and staff circulation, outdoor spaces, roads and service ways, public walkways, vegetation and landscape areas, utilities, perimeter fencing, etc. The Master Plan should include the overall conceptual approach, drawings, sketches, graphic illustrations, maps, charts, perspective renderings, cost estimates, project descriptions, schedule, and project sequencing all of which will be in such media and format to be easily used for fundraising and marketing presentations.

Final Public Meeting. A final public presentation outlining an extraordinary, realistic and inspiring final plan. The meeting will include a description of the process leading to the final master plan design and the resulting strategies for potential economic impacts, resource commitment, funding, and implementation.

The final step will be the presentation to BREC Commission for approval.

2.2 Period of Agreement

The term of any contract resulting from this solicitation shall begin on or about September 2018 and is anticipated to conclude within 7 months.

2.3 Price Schedule

Prices proposed by the proposers should be submitted on the Proposal Form furnished herein as **Attachment 1**. Prices submitted shall be firm for the term of the contract and inclusive of all charges Consultant wishes BREC to consider for proposed services (items, etc).

2.4 Location

Location of the work: Greenwood Community Park - 13350 Highway 19, Baker, Louisiana, 70714.

Meetings/Delivery may be performed, completed or managed at BREC's Administrative Offices – 6201 Florida Boulevard, Baton Rouge, Louisiana, 70806

2.5 Consultant's General Qualifications

BREC seeks a consultant team that has demonstrated the following general requirements:

- Experience in the development of zoo master plans and zoo strategic plans.
- Experience in the development revenue generating amenities for zoos.
- Relevant experience and technical competence of the Consultant, the personnel assigned to this project, and the degree of participation in the project by the key personnel.
- Recent experience with zoo master planning and strategic planning projects demonstrating a clear understanding of the project.
- Promptness and commitment in which the Consultant can commence and complete the work to meet time schedules.

- Excellent corporate and governmental project and individual references for which the Consultant has provided comparable work.
- Selected firm to carry \$1,000,000 in Errors and Omissions Insurance.

PART III. EVALUATION CRITERIA and SCORING CHART

The Committee will evaluate all Requests for Proposals and develop a “short-list” of the most qualified firms. Each submittal will be judged as to the Consultant’s capabilities and experience to perform the Scope of Services. Selection will be based on a 100-point criterion as noted below.

Evaluation Criteria and Scoring Chart

Project Team’s Capabilities to Accomplish Work	25 pts total
Demonstrate capability to provide the Scope of Services by showing a clear understanding of the requirements and the work to be performed.	5
An interactive approach with BREC Zoo staff, the public, and sufficient involvement on behalf of the principal/project manager.	5
Ability to provide the Scope of Services in a timely manner.	5
The proposed project team leader and members will be a prime consideration. Consultants will be required to indicate a percentage of time commitment for each team member throughout the project. The Consultant will be required by contract to commit these personnel through the life of the project.	5
Describe the project team leader’s personal qualifications and other project work he or she will be involved with during the period of this contract.	5
Project Team’s Organization & Experience	25 pts total
Number of qualified staff and support staff	5
Technical competence, experience and education of key personnel	5
Recent, relevant experience with similar-zoo planning and master plans	5
Quality of comparable experience including designing, programming and or developing guest experiences and amenities that increase guest satisfaction or leverage additional operating revenue	5
References and work sample	5
Project Approach & Proposal Content	40 pts total
Proposed methodology for completing work	10
Demonstrate thorough approach to the project	5
Clearly explain procedures that will be used for the project	10
Understanding of the Zoo’s mission and organization	5
Design aesthetic	5
Quality and responsiveness of the proposal	5
Fee Proposal and Schedule	10 pts total
Total fee	5
Work program schedule proposed for the tasks included in the Scope of Services	5
TOTAL POINTS POSSIBLE	100 pts

Formatting your proposal into these categories will greatly improve the reviewing Committee’s chances of finding the key material and scoring accordingly.

If needed, interviews will be held. Based on the submittals, possible interviews, and fee proposals, a Consultant will be recommended to the Selection of Professionals Committee and then the BREC Commission for a contract award. Should BREC and the selected Consultant be unable to agree on contract terms, the award of the contract will be offered to the second-ranking

project team, and so forth as necessary.

It is the intent of the selection process to examine the demonstrated competence and professional qualifications of the design professional. The fee proposal and schedule are intended to assist the Committee in gauging a fair and equitable fee for the services requested. BREC may, at its option, negotiate and modify the Scope of Services with the selected firm and negotiate fee and schedule adjustments, as BREC deems appropriate.

PART IV. FEDERAL CLAUSES (NOT REQUIRED FOR THIS RFP)

5.1 Civil Rights

Both parties shall abide by the requirements of Title VII of the Civil Rights Act of 1964, and shall not discriminate against employees or applicants due to color, race, religion, sex, handicap or national origin. Furthermore, both parties shall take Affirmative Action pursuant to Executive Order #11246 and the National Vocational Rehabilitation Act of 1973 to provide for positive posture in employing and upgrading persons without regard to race, color, religion, sex, handicap or national origin, and shall take Affirmative Action as provided in the Vietnam Era Veteran's Readjustment Act of 1974. Both parties shall also abide by the requirements of Title VI of the Civil Rights Act of 1964 and the Vocational Rehabilitation Act of 1973 to ensure that all services are delivered without discrimination due to race, color, national origin or handicap.

5.2 Anti-Kickback Clause

The Service Provider hereby agrees to adhere to the mandate dictated by the Copeland "Anti-Kickback" Act which provides that each Service Provider or sub grantee shall be prohibited from inducing, by any means, any person employed in the completion of work, to give up any part of the compensation to which he is otherwise entitled.

5.3 Clean Air Act

The Service Provider hereby agrees to adhere to the provisions which require compliance with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act which prohibits the use under non-exempt Federal contracts, grants or loans of facilities included on the EPA list of Violating Facilities.

5.4 Energy Policy and Conservation Act

The Service Provider hereby recognizes the mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plan issued in compliance with the Energy Policy and Conservation Act (P.L. 94-163).

5.5 Clean Water Act

The Service Provider hereby agrees to adhere to the provisions which require compliance with all applicable standards, orders, or requirements issued under Section 508 of the Clean Water Act which prohibits the use under non-exempt Federal contracts, grants or loans of facilities included on the EPA List of Violating Facilities.

5.6 Anti-Lobbying and Debarment Act

The Service Provider will be expected to comply with Federal statutes required in the Anti-Lobbying Act and the Debarment Act.

ATTACHMENT A

PROPOSAL FORM

BREC

Sealed proposals will be received until 11am, **Thursday, July 12, 2018** by the Purchasing Division, 6201 Florida Blvd, Rm 2034, Baton Rouge, La 70806 Immediately after 11am the same day and date, proposals will be publicly opened.

PROPOSAL OF _____

ADDRESS _____

DATE _____

BREC

Purchasing Director

6201 Florida Blvd.

Baton Rouge, LA 70806

The undersigned hereby agrees to furnish all materials, tools, equipment, insurance and labor to perform all services required for the following project:

**REQUEST FOR PROPOSALS No. 175
PROFESSIONAL CONSULTANT SERVICES FOR
BREC'S BATON ROUGE ZOO MASTER PLAN**

as set forth in the following Contract Documents:

1. Notice to Proposers
2. The Specifications (Administrative and General Information, Scope of Work/Services, Evaluation, Performance Standards, Attachments and Appendix.)
3. Proposal Forms with Attachments
4. Agreement
5. The following enumerated addenda: _____ receipt of which is hereby acknowledged.

The undersigned declares that the only persons or parties interested in this proposal as principals are those named herein; that this proposal is made without collusion of any kind with any other person, firm, association or corporation; that the undersigned has carefully examined the site of the proposed work, and proposes, and agrees, if this proposal is accepted, to do all the work and furnish all the services specified in accordance with the requirements of the Contract Documents and to accept as full compensation therefore the total amount of the prices herein proposed, subject to any mutually agreed upon amendments.

The undersigned agrees that the proposal is firm until time of award.

The undersigned agrees to execute the Agreement and Affidavit and furnish to BREC all insurance certificates and performance bond (if applicable) required for the project within fifteen (15) calendar days after receiving notice of award from BREC.

The undersigned further agrees that the work will begin on the date specified in the Notice to Proceed, projected to be on or about September 2018 and shall be diligently prosecuted at such rate and in such manner as, in the opinion of BREC's Representative is necessary for the prosecution of the work within the times specified in the Agreement, it being understood that time is of the essence.

The price for performance of all services in accordance with the Contract Documents is based on the unit (or other costs) proposed and accepted after contract negotiations.

NOTE: This financial proposal shall include any and all costs the Consultant wishes to have considered in the contractual arrangement with BREC. If quoted as a lump sum, individual rates and itemized costs included in lump sum are to be included with proposal submittal.

All supplemental information requested is enclosed or presented in a separate sealed box or envelope

(SIGNATURE)

(Typed Name and Title)

THE ATTACHED BIDDER'S ORGANIZATION SHEET MUST BE COMPLETED TO INDICATE WHETHER BIDDER IS AN INDIVIDUAL, PARTNERSHIP, ETC.

PRICING SCHEDULE

List all pricing details here. Additional sheets may be added if needed.

PHASE 1: Site Analysis, Data Gathering and Base Mapping (2 Months)	COST
	\$
PHASE 2: Strategic Business Plan (3 months)	COST
	\$
PHASE 3: Project Prioritization, Cost Estimating and Facility Master Plan (5 Months)	COST
	\$
TOTAL PROJECT COST	\$

Other Costs – add lines or additional sheets as needed.

1. Professional Service Rates:

2. Travel

3. Reimbursables

AFFIDAVIT

BREC

Parks and Recreation Commission

BEFORE ME, the undersigned authority, personally came and appeared

who, being duly sworn did depose and say:

That he is a duly authorized representative of _____
receiving value for services rendered in connection with:

**REQUEST FOR PROPOSALS No. 175
PROFESSIONAL CONSULTANT SERVICES FOR
BREC'S BATON ROUGE ZOO MASTER PLAN**

a public project of BREC, Parish of East Baton Rouge, Louisiana: that he has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by him whose services in connection with the construction, alteration, or demolition of the public building or project or in securing the public contract were in the regular course of their duties for him; and that no part of the contract price received by him was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by him whose services in connection with the construction of the public building or project were in the regular course of their duties for him.

This affidavit is executed in compliance with the provisions of LA R.S. 38:2224.

Affiant's Signature

SWORN TO AND SUBSCRIBED before me, on this _____ day of _____, 20____.
Baton Rouge, Louisiana.

NOTARY PUBLIC

BIDDER'S ORGANIZATION

BIDDER IS:

AN INDIVIDUAL

Individual's Name: _____

Doing business as: _____

Address: _____

Telephone No.: _____ Fax No.: _____

A PARTNERSHIP

Firm Name: _____

Address: _____

Name of person authorized to sign: _____

Title: _____

Telephone No.: _____ Fax No.: _____ Email: _____

A LIMITED LIABILITY COMPANY

Company Name: _____

Address: _____

Name of person authorized to sign: _____

Title: _____

Telephone No.: _____ Fax No.: _____ Email: _____

A CORPORATION

IF BID IS BY A CORPORATION, THE CORPORATE RESOLUTION MUST BE SUBMITTED WITH BID.

Corporation Name: _____

Address: _____

State of Incorporation: _____

Name of person authorized to sign: _____

Title: _____

Telephone No.: _____ Fax No.: _____ Email: _____

IF BID IS BY A JOINT VENTURE, ALL PARTIES TO THE BID MUST COMPLETE THIS FORM.

CORPORATE RESOLUTION

A meeting of the Board of Directors of _____
a corporation organized under the laws of the State of _____
and domiciled in _____ was held this _____ day _____, 20____
and was attended by a quorum of the members of the Board of Directors.

The following resolution was offered, duly seconded and after discussion was unanimously
adopted by said quorum:

BE IT RESOLVED, that _____
is hereby authorized to submit proposals and execute agreements on behalf of this corporation with
BREC, for the Parish of East Baton Rouge.

BE IT FURTHER RESOLVED, that said authorization and appointment shall remain in full force and
effect, unless revoked by resolution of this Board of Directors and that said revocation will not take
effect until the Finance Director of BREC, shall have been furnished a copy of said resolution, duly
certified.

I, _____, hereby certify that I am the Secretary of _____,
a corporation created under the laws of the State of _____ domiciled in _____;
that the foregoing is a true and exact copy of a resolution adopted by a quorum of the Board of
Directors of said corporation at a meeting legally called and held on the _____ day of _____ 20____, as
said resolution appears of record in the Official Minutes of the Board of Directors in my possession.

This _____ day of _____, 20____

SECRETARY

Attachment B

Insurance Requirements for:

REQUEST FOR PROPOSALS No. 175

BREC'S BATON ROUGE ZOO MASTER PLAN

CONSULTANT'S AND SUB-CONSULTANT'S INSURANCE: Consultant and any sub-consultants shall carry and maintain at least the minimum insurance as specified below until completion and acceptance of the work covered by this contract. Consultant shall not commence work under this contract until certificates of insurance have been approved by BREC Purchasing Division. Insurance companies listed on certificates must have industry rating of A-, Class VI or higher, according to Best's Key Rating Guide. Consultant is responsible for assuring that its sub-consultants meet these insurance requirements.

A.	Commercial General Liability on an occurrence basis:	General Aggregate	\$2,000,000
		Each Occurrence	\$1,000,000
B.	Business Auto Policy		
	Any Auto; or Owned, Non-Owned & Hired:	Combined Single Limit	\$1,000,000
C.	Standard Workers Compensation - Full statutory liability for State of Louisiana with Employer's Liability Coverage.		
D.	BREC, must be named as additional insured on all general liability policies described above.		
E.	Professional Liability coverage for errors and omissions:		\$1,000,000
F.	Certificates must provide for thirty (30) days written notice to Certificate Holder prior to cancellation or change.		
G.	The Certificate Holder should be shown as: BREC, Attn: Purchasing Division, 6201 Florida Blvd, Baton Rouge, Louisiana 70806		

NOTE TO PROPOSERS:

- 1) **Submit evidence of these Insurance Requirements with all required information set forth in the solicitation documents as your proposal.**
- 2) **Retain the complete set of Specifications and Contract Documents and a copy of the Insurance Forms for your files.**

Attachment C

Sample Contract for:

REQUEST FOR PROPOSALS No. 175

BREC'S BATON ROUGE ZOO MASTER PLAN

This Contract, made and entered into at Baton Rouge, Louisiana, effective this _____ day of _____, 20____ by and between BREC, herein referred to as BREC and _____ herein referred to as "Consultant".

Consultant shall provide consulting services as described herein for ...

Consultant agrees to proceed, upon written notice of the Assistant Superintendent of Planning and Construction, with all professional services necessary for the performance, in proper sequence and in the time specified, of the items of work as hereinafter set forth. Services will be subject to review and administration by the office requesting the service unless designated otherwise by BREC. All the services required hereunder will be performed by Consultant or under his supervision and all personnel engaged in the work shall be fully qualified and shall be authorized or permitted under state and local law to perform such services.

SCOPE OF SERVICES: The services to be rendered by the Consultant for this project shall be as follows. The scope of services requested includes the following three phases of work:

Phase 1: Site Analysis, Data Gathering and Base Mapping (2 Months)

This will include the gathering of existing site data, inventory and base mapping. BREC's Planning & Engineering and Zoo Departments will provide existing CAD files, reports, previous park project plans and other pertinent information related to prior design and development efforts. The Consultants will meet with Zoo staff and designated BREC leaders to conduct a thorough review and summary analysis of BREC's Baton Rouge Zoo, which includes but is not limited to:

- Visitor amenities, circulation and public spaces
- Visitation & visitor profile
- Attendance, traffic, parking
- Existing concessions and rides
- Existing exhibits
- Analysis of existing Zoo land use
- Analysis of overall Zoo maintenance practices
- Animal care facilities (including hospital, necropsy, quarantine, and holding facilities)
- Existing buildings (including administrative, educational, operational)
- Existing utilities/infrastructure (including domestic water, irrigation, electrical, lighting, drainage, shutoff valves)
- Existing service facilities and service vehicle access
- Current programs
- Current landscaping

Deliverables shall include an analysis report of existing facilities and a plot plan of existing facilities and utilities.

Phase 2: Strategic Business Plan (3 months)

The Consultants will develop a Strategic Business Plan for BREC's Baton Rouge Zoo which includes but is not limited to:

- S.W.O.T. analysis
- Market analysis
- Identify and review trends and recent developments in the zoo community
- Economic impact analysis
- Economic development strategy
- Attendance & operational projections
- Guest services/retail strategies
- Public/private funding partnerships
- Marketing plan
- Operations plan

Deliverables shall include a comprehensive ten-year Strategic Business Plan for BREC's Baton Rouge Zoo. The plan will be a framework based on common themes and values received from the Zoo project team and the public, economic development strategies for the area, revenue generation, recreational trends and needs, program and event opportunities, public/private partnership opportunities, development of new facilities and enhancements to existing facilities.

We will kick-off up to eight (8) 1-hour meetings with key stakeholders and partners including the mayors of Baton Rouge, Central, Zachary, and Baker; meetings with BREC Commissioners, business leaders, community leaders, tourism agency leaders, Friends of The Zoo, and the BREC Foundation. BRZ will facilitate scheduling stakeholder meetings.

In addition, the 1st Public Meeting will be held - Present preliminary findings and initial concepts. The meeting must be designed with creative and effective public engagement methods that inspire and excite the public about the process that result in good participation.

Phase 3: Facility Master Plan (5 Months)

The Consultants will design and develop a Master Plan which includes but is not limited to:

- An immediate \$5M phase of improvements to assist in re-establishing AZA Accreditation to be provided.
- Concept development/key themes
- Animal exhibit plan/organizational theme
- Animal collection plan recommendations
- Innovative ideas linking our animal collection, exhibit, green buildings and gardens to our mission of conservation, education, animal welfare and recreation/family entertainment;
- Education interpretive plan
- Plan for revenue generating facilities, including expanding eatery, retail, rides and other innovative/entertainment activities

- Visitor services and amenities
- Enhancements to landscaping and public pathways
- Facility support services
- Traffic, attendance & parking projections
- Visitor circulation plan
- Vehicular circulation plan
- Service and operations plan
- Proposed utilities upgrade
- Prioritization and phasing of projects
- Statement of probable costs, including escalation

This phase will include up to five (5) 1-2 hour public meetings with key stakeholders and partners including the mayors of Baton Rouge, Central, Zachary, and Baker; meetings with BREC Commissioners, business leaders, community leaders, tourism agency leaders, Friends of The Zoo, and the BREC Foundation. BRZ will facilitate scheduling stakeholder meetings.

Deliverables shall include a Master Plan that will chart the Zoo's future development for the next 15-20 years. This cohesive conceptual design of the facilities of the entire zoo will include all existing and proposed buildings, animal exhibits and holding spaces, visitor amenities and attractions, guest and staff circulation, outdoor spaces, roads and service ways, public walkways, vegetation and landscape areas, utilities, perimeter fencing, etc. The Master Plan should include the overall conceptual approach, drawings, sketches, graphic illustrations, maps, charts, perspective renderings, cost estimates, project descriptions, schedule, and project sequencing all of which will be in such media and format to be easily used for fundraising and marketing presentations.

Final Public Meeting. A final public presentation outlining an extraordinary, realistic and inspiring final plan. The meeting will include a description of the process leading to the final master plan design and the resulting strategies for potential economic impacts, resource commitment, funding, and implementation.

The final step will be the presentation to BREC Commission for approval.

CONTRACT MODIFICATIONS: No amendment or variation of the terms of this contract shall be valid unless made in writing, signed by the parties and approved as required by law. No oral understanding or agreement not incorporated in the contract is binding on any of the parties.

Changes to the contract include any change in a) compensation; b) beginning/ending date of the contract; c) scope of work; and/or d) Consultant change through the assignment of contract process. Any such changes, once approved, will result in the issuance of an amendment to the contract.

GENERAL REQUIREMENTS: With the exception of the services specifically listed to be furnished by BREC Consultant shall, for the agreed fees, obtain all data and furnish all services and materials required to provide the contracted services. All items required to accomplish these results, whether or not specifically mentioned in this contract, including attendance by the Consultant or their representatives at conferences and public hearings, are to be furnished at the expense of Consultant.

SERVICES TO BE PERFORMED BY BREC: BREC will furnish the Consultant without charge all information which it has in its files which may be useful to the Consultant in carrying out this work, as well as assistance in securing data from others to the extent available.

COMPENSATION AND PAYMENT: BREC shall pay and Consultant agrees to accept compensation for the Consulting services to be performed under this contract, at the rates indicated on the Cost Proposal Form attached and made a part of the contract.

Monthly invoices for work completed to date may be submitted by Consultant, and subject to the approval of the Department Head or his/her designee, will be paid within 30 days after approval.

CONTRACT TIME: The services to be performed under this contract shall be commenced promptly by the Consultant and shall be completed as defined in the notice to proceed issued for each event.

COMMENCEMENT OF WORK: No work shall be performed by Consultant and BREC shall not be bound until such time as a Contract is fully executed between BREC and the Consultant and all required approvals are obtained at which time Task/Work Orders will be used to order specific quantities and types of services.

OWNERSHIP OF DOCUMENTS: All data collected by Consultant and all documents, notes, drawings, tracings and files collected or prepared in connection with this work, except Consultant's personal and administrative files, shall become the property of BREC, and BREC shall not be restricted in any way whatsoever in its use of such materials.

DELAYS AND EXTENSIONS: Consultant will be given an extension of time for delays beyond their control such as weather or those caused by tardy approvals of work in progress, but no additional compensation shall be allowed for such delays.

TERMINATION OR SUSPENSION: BREC may terminate this contract for cause based upon the failure of the Consultant to comply with the terms and/or conditions of the Agreement, or failure to fulfill its performance obligations pursuant to this Agreement, provided that BREC shall give the Consultant written notice specifying the Consultant's failure. If within ____ days after receipt of such notice, the Consultant shall not have either corrected such failure or, in the case of failure which cannot be corrected in ____ days, begun in good faith to correct such failure and thereafter proceeded diligently to complete such correction, then BREC may, at its option, place the Consultant in default and the Agreement shall terminate on the date specified in such notice.

The Consultant may exercise any rights available to it under Louisiana Law to terminate for cause upon the failure of BREC to comply with the terms and conditions of this contract; provided that the Consultant shall give BREC written notice specifying BREC failure and a reasonable opportunity for BREC to cure the defect.

BREC may terminate this Agreement at any time by giving ____ days written notice to the Consultant of such termination or negotiating with the Consultant an effective date.

The Consultant shall be entitled to payment for deliverables in progress, to the extent work has been performed satisfactorily.

Should BREC find it necessary to suspend the work for lack of funding or other circumstances beyond its control, this may be done by ____ days notice given by BREC in writing to that effect. The work may be

reinstated and resumed in full force and effect upon receipt from BREC of ____ days notice in writing to that effect.

This agreement shall ipso-facto terminate three years after the date of the suspension of the work as provided above if the work has not been reinstated and resumed by notice from BREC during the three year period, and neither party shall have any further obligation to the other party.

DISPUTES: Any dispute concerning a question of fact in connection with the work not disposed of by agreement between the parties shall be referred to the Director of Finance or her duly authorized representative for determination, whose decision in the matter shall be final and conclusive on the parties to this contract. This disputes clause does not foreclose the rights of the parties with respect to questions of law in connection with decisions provided for in the foregoing sentence.

INDEPENDENT CONSULTANT OBLIGATION: Consultant shall be an independent Consultant under this contract and shall assume all of the rights, obligations and liabilities applicable to him as an independent Consultant hereunder. Consultant shall perform all details of the services in a manner consistent with that level of care and skill ordinarily exercised by other professional Consultants under similar circumstances at the time the services are performed, with BREC interested only in the results of the work.

COMPLIANCE WITH APPLICABLE LAWS: Consultant shall procure all permits and licenses applicable to the services to be performed and shall comply with any and all Local, State and Federal laws including those regarding age, citizenship, hours, wages and conditions of employment affecting the service covered by this agreement. Consultant shall pay the contributions measured by wages of his employees required by the Federal Unemployment Tax Act, Federal Insurance Contributions Act, and any other payroll tax as required by law.

INDEMNITY: Service Provider agrees to indemnify, defend, and hold harmless BREC from any and all losses, damages, expenses or other liabilities, including but not limited to connected with any claim for personal injury, death, property damage or other liability that may be asserted against BREC by any party which arises or allegedly agents in performing its obligations under this Agreement.

Service Provider, its agents, employees and insurer (s) hereby release BREC its agents and assigns from any and all liability or responsibility including anyone claiming through or under them by way or subrogation or otherwise for any loss or damage which Service Provider, its agents or insurers may sustain incidental to or in any way related to Service Provider's operations under this Agreement.

PERSONAL INTEREST: Consultant covenants that he presently has no interest and shall not acquire any interest, direct or indirect, in the above described Study or any other interest which would conflict in any manner or degree with the performance of his services hereunder. The Consultant further covenants that in the performance of his contract no person having any such interest shall be employed.

AFFIDAVIT AND CORPORATE RESOLUTION: Consultant shall attest by Affidavit, a sworn statement that this contract was not secured through employment or payment of a solicitor. If Consultant is a corporation, a corporate resolution is furnished as evidence of authority to execute the contract.

CIVIL RIGHTS COMPLIANCE: The Consultant agrees to abide the requirements of the following as applicable: Title VI and Title VII of the Civil Rights Act of 1964, as amended by the Equal Opportunity Act of 1972, Federal Executive Order 11246, the Federal Rehabilitation Act of 1973, as amended the Vietnam Era of 1975, the

Consultant agrees to abide by the requirements of the Americans with Disabilities Act of 1990. Consultant agrees not to discriminate in its employment practices, and will render services under this Agreement and any contract entered into as a result of this Agreement, without regard to race, color, religion, sex, sexual orientation, national origin, veteran status, political affiliation, or disabilities. Any act of discrimination committed by Consultant, or failure to comply with these statutory obligations when applicable shall be grounds for termination of this Agreement and any contract entered into as a result of this agreement.

ADDITIONAL REQUIREMENTS OF FEDERAL GRANT FUNDED PROJECTS: If the project is funded in whole or in part by Federal Grants, Consultant shall comply with the Federal Requirements. Consultant shall also include these Federal Requirements in any sub-contracts.

TAXES: Any taxes, other than state and local sales and use taxes, from which BREC is exempt, shall be assumed to be included within the Consultant's cost.

RIGHT TO AUDIT: BREC or others so designated by BREC, or other lawful entity shall have the option to audit all accounts directly pertaining to the resulting contract for a period of five (5) years after project acceptance or as required by applicable Local, State and Federal law. Records shall be made available during normal working hours for this purpose.

ASSIGNMENT: Assignment of contract, or any payment under the contract, requires the advanced written approval of BREC.

CONFIDENTIALITY: The following provision will apply unless BREC agency statement of work specifically indicates that all information exchanged will be non-confidential:

All financial, statistical, personal, technical and other data and information relating to BREC's operations which are designated confidential by the State and made available to the Consultant in order to carry out this contract, shall be protected by the Consultant from unauthorized use and disclosure through the observance of the same or more effective procedural requirements as are applicable to BREC. The identification of all such confidential data and information as well as BREC's procedural requirements for protection of such data and information from unauthorized use and disclosure shall be provided by BREC in writing to the Consultant. If the methods and procedures employed by the Consultant for the protection of the Consultant's data and information are deemed by BREC to be adequate for the protection of BREC's confidential information, such methods and procedures may be used, with the written consent of BREC, to carry out the intent of this paragraph. The Consultant shall not be required under the provisions of the paragraph to keep confidential any data or information, which is or becomes publicly available, is already rightfully in the Consultant's possession, is independently developed by the Consultant outside the scope of the contract, or is rightfully obtained from third parties.

RECORD RETENTION: The Consultant shall maintain all records in relation to this contract for a period of at least five (5) years from close of file.

ORDER OF PRECEDENCE

The Request for Proposals (RFP), dated _____, and the Consultant's Proposal dated _____, are attached hereto and, incorporated into this Contract as though fully set forth herein. In the event of an inconsistency between this Contract, the RFP and/or the Consultant's Proposal, unless otherwise provided herein, the inconsistency shall be resolved by giving precedence first to this Contract, then to the RFP and subsequent addenda (if any) and finally, the Consultant's Proposal.

GOVERNING LAW: This Contract shall be governed by and interpreted in accordance with the laws of the State of Louisiana. Venue of any action brought with regard to this Contract shall be in the Nineteenth Judicial District Court, parish of East Baton Rouge, State of Louisiana.

COMPLETE CONTRACT

This is the complete Contract between the parties with respect to the subject matter and all prior discussions and negotiations are merged into this contract. This contract is entered into with neither party relying on any statement or representation made by the other party not embodied in this contract and there are no other agreements or understanding changing or modifying the terms. This Contract shall become effective upon final approval by both parties.

IN WITNESS WHEREOF, BREC and Consultant have executed this contract effective as of the date first written above.

WITNESSES:

BREC

Recreation and Park Commission
for the Parish of East Baton Rouge

By _____

Title _____
Typed Name and Title

Consultant

By _____

Title _____
Typed Name and Title

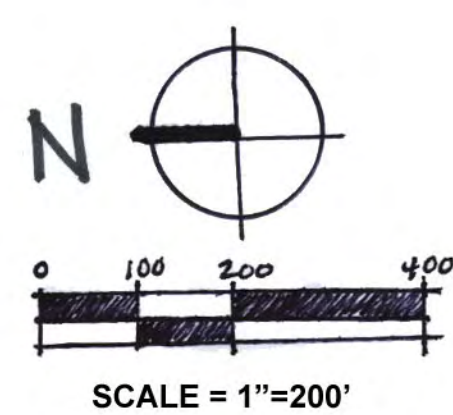
LEGEND

- 1 UNIFIED PARK ENTRY EXPERIENCE
- NEW ENTRY EXPERIENCE
- ADJUSTED GOLF COURSE
- SAFER ENTRY ROAD
- 2 ACTIVITY HUB (SEE DETAIL PLAN)
- MAIN ACTIVITY AREA OF PARK
- LAKE ACCESS
- TRAIL ACCESS
- FACILITY BUILDING, PICNIC, AND PLAY AREAS
- 3 ISLAND PAVILION
- 4 SMALL FISHING PIER
- 5 TRAIL WITH EXERCISE STATIONS
- 6 DUMAS GOLF COURSE SERVICE AREA
- PROSHOP MOVED TO ACTIVITY HUB
- 7 NEW EXPANDED TRAILS
- 8 NEW RESIDENT DRIVEWAY WITH GATED ACCESS
- 9 SERVICE DRIVE WITH GATED ACCESS
- 10 ENHANCED TREE PLANTING
- 11 FUTURE VEHICULAR ACCESS
- UNIFIES PARK CIRCULATION SYSTEM WITH A
- MAIN ENTRY FOR ALL USES FROM HWY 19
- 12 FUTURE TRAIN OR TRAM CIRCULATION
- TRAIN OR TRACKLESS VEHICLE
- FUTURE LOOP WOULD SERVE NEW USES
- WITH DESIGNATED STATIONS
- USERS CAN PARK, THEN TRAVEL VIA TRAIN
- OR TRAM TO MULTIPLE PARK ACTIVITY AREAS
- 13 ZOO ROAD EMERGENCY ACCESS ONLY
- 14 NEW ZOO VEHICULAR ENTRY EXPERIENCE
THROUGH FOREST
- 15 NEW CLARK PARK VEHICULAR ENTRY
EXPERIENCE THROUGH FOREST
- 16 EXISTING CLARK PARK ENTRY USED FOR
EMERGENCY ACCESS ONLY
- 17 DOG PARK
- 18 SLIDING MOUND/ PICNIC AREA
- 19 COMMUNITY GARDENS
- 20 DISC GOLF SEPERATE FROM PICNIC AREAS.
COURSE ORIGINATES FROM TENNIS CENTER

- 340 TOTAL PARKING SPACES & 8 TOTAL BUS
PARKING SPACES WITHIN PARK HUB AREA.



MASTER PLAN





GREENWOOD

COMMUNITY PARK





Greenwood Community Park Survey

November 2015

conducted by:



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I. EXECUTIVE SUMMARY

Percy & Company conducted an survey of 327 heads-of-households in neighborhoods within a two to three mile radius of Greenwood Community Park on Saturday, November 7 and Sunday, November 8, 2015. The four-page survey was administered door-to-door to determine how residents in the community [primarily Baker and Scotlandville] would like to see Greenwood Community Park re-developed with a series of potentially new amenities to serve a larger segment of the community.

- ➡ Approximately 4 in10 households surveyed [39.3%] visit a BREC park at least several times each month. 13.5% claim to visit a BREC park weekly.
 - Activities 'most enjoyed' at BREC parks:
 - The Playground
 - Walking / Exercise
 - Basketball
 - Picnicking
 - Greenwood is by far the 'most visited' park for approximately 50% of the households in the surveyed area. Why?
 - It is Close
 - Good for the Family
 - Playground / Kids can Play
 - Nature / to Relax
 - Exercise / Walking
 - Younger persons [under age 45], females and households with 2 to 4 children are the most frequent visitors to BREC parks.

➡ We asked how often respondents visit BREC's Baton Rouge Zoo. 3.1% claim to visit monthly and 23.9% say . . 'Several times each year.'

- When asked . . . "*Why do you not visit the Zoo more often?*" we found the most often given responses to be:
 - No Reason, Can't really say / Don't know
 - Not enough time - Work
 - Zoo is for kids / not exciting
- Asked how the zoo might encourage more visits we found the response to be equally non-committed . . .
 - 'Don't Know – No Idea' [100 respondents]
 - Get More Animals
 - More Activities / More Excitement

➡ We interviewed 18 golfers in our survey. The most frequently played golf courses for them are:

- Clark @ Greenwood
- Dumas @ Greenwood

Note: Golfers tended to be males over the age of 35 years.

➡ When asked to rate the importance of 20 potential park enhancements for Greenwood Community Park, we see the five highest rated as . . .

- Adventure Playground for Children
- Water Park / Swimming Pool
- Paved Walking and Jogging Trails
- Outdoor Basketball Courts
- New Recreation Center

➡ Asked to name their top three choices of potential park enhancements, however, we see the following rank-ordering emerge:

- Adventure Playground for Children [135 mentions]
- Water Park / Swimming Pool [104 mentions]
- Large, Stocked Lake with Piers [67 mentions]
- Paved Walking & Jogging Trails [63 mentions]
- Picnic Area / Horseshoe Area [54 mentions]

Conclusions:

From the above key findings we make the following conclusions:

While the Greenwood Park complex is the 'Most Visited' BREC park in the survey area, the great majority are not visiting for either golf or BREC's Baton Rouge Zoo. In fact, the park attributes or 'drivers' of visitation for this population are much more frequently the family-oriented, recreational offerings: playground for children, picnicking, walking/exercise and 'nature/outdoor experience'.

Hence

With the great majority of households in this area visiting the Zoo infrequently, rarely or never we would not anticipate a strong or 'organized opposition' to relocation of the zoo based on the data presented herein. Further, we would expect support for a relocation strategy - provided BREC clearly communicate the WIN-WIN nature of the plan:

- A New and Expanded Greenwood facility featuring the amenities most desired by the community: Adventure Playground, Swimming Pool/Water Park, Walking and Hiking Trails, Enhanced Picnicking facilities as well as more Outdoor Basketball Courts.
- A New and Enhanced Zoo with greater opportunity for visitation created through synergies with other tourism venues and proximity to larger populations.

Given a clear, transparent communications program to build understanding of the issues and challenges facing the zoo in its current location – as well as BREC's sincere goal of re-focusing Greenwood Park to deliver more amenities and attractions for increased use by the local community, we feel the community will respond with support.

II. INTRODUCTION / METHODOLOGY

- ➔ Percy & Company conducted a statistical survey of 327 households in neighborhoods within a two to three mile radius of Greenwood Community Park in East Baton Rouge Parish on Saturday, November 7 and Sunday, November 8, 2015. Applying standard statistical methods, overall full sample results presented herein can be considered accurate to +/- 5.8% at the 95% level of confidence; sub-markets have higher expected variance.
- ➔ Households were chosen as a geographic, demographic and socio-economic representation of the communities which surround Greenwood Community Park.
- ➔ The sample of 327 households was divided as follows:

Zone	Target Number of Completed Interviews	Actual Number of Completed Interviews
Households Within 1-mile radius of Park	60	63
Households Within 2-3 Mile Radius	265	264
	325	327

Table 1a (to be read vertically)

Direction	Target Number of Completed Interviews	Actual Number of Completed Interviews
Baker	200	203
Scotlandville	60	59
Plank Rd. [East]	65	65
	325	327

Table 1b (to be read vertically)

III. RESEARCH FINDINGS

In the following presentation of findings from our survey you will note:

- ➡ Results are not always presented in the same order as questioned on the actual survey, but in a logical flow to enhance the overall understanding of the findings.
- ➡ We present the results by 'full sample' as well as by three distinct areas surrounding Greenwood Community Park.
- ➡ Demographic analysis is included with each tabulation in narrative form.

A. BREC Parks Most Visited

Question: “How often do you or your family members visit a BREC Park in your area?”

Question: “When you visit a BREC Park, Which one do you visit most often?”

Question: “Why do you visit that park most often?”

How often do you or members of your household go to BREC parks in your area?

	%	N
Every Week	13.5	43
Once or Twice each Month	25.8	82
Several Times Each year	33.7	107
Rarely	15.4	49
Never	11.6	37
Total	100.0	318

Table 2 (to be read vertically)

- ➔ As shown above, over 1/3 of our sample report visiting a BREC park at least monthly [39.3], with 13.5% claiming to visit a park weekly.
- ➔ As expected, younger persons [under age 45] visit more frequently – fully 50% in this age group claim to visit monthly.
- ➔ Females and households with children show higher levels of BREC park visitation.
- ➔ We see no significant differences in visitation between the three primary areas surveyed [Baker, Scotlandville and East of Plank Rd.]

“Which Park do you visit most often?”
“What other BREC Parks do you Visit?”

	Visit Most		Other Parks Visited	
	%	N	%	N
Greenwood / Dumas / Clark	47.5	154	7.4	24
Anna T. Jordan	9.0	29	7.1	23
Baker Park	4.6	15	2.2	7
Myrtle Street Park	4.6	15	.6	2
The Zoo	2.2	7	3.7	12
Independence	1.5	5	1.5	5
Chamberlain Park	1.5	5		
Howell Park	1.9	6	3.1	10
Webb Park golf	.6	2		
Highland Rd.	.3	1		
Kenilworth	.6	2		
Other	4.9	16		
None / No Answer	13.5	44		
Total N		327		

Table 3

As expected, Greenwood Community Park is the most visited with 47.5% claiming it as such [Almost 50% if we add the 2.2% for the Zoo].

Why do you visit this BREC park most often?

- **Greenwood:**

Close – 29
Good for Family – 26
Playground / Kids Play – 26
Nature / To Relax - 16
Exercise/Walking – 7
Dog Park – 7
Fishing - 6
Golf – 5
Zoo – 5
Best – 5
Activities – 5
Tennis – 4
Picnic – 4
Party Room – 4
Basketball – 2

- **Anna T. Jordan:**

Sports – 8
Playground – 6
Best – 3
Like It – 3
For Kids – 3
Pool -2
Rec Center / Activities –

Baker Park:

Kids Like to Play – 8
Close 2
For dogs – 1

Chamberlain:

Jog / Walk – 3
Dogs – 2
Close – 2

Howell Park:

Close – 1
Basketball – 1
Picnic – 1
Walking / Exercise – 1
Swimming – 2

Independence:

Exercise / Walking – 2
Picnic – 2
Library – 1

Kenilworth:

Skateboard – 3
Rock Climb - 1

Mills:

Close – 21

Myrtle:

Close – 13
Kids Play - 2

“When you visit a BREC Park, what activities do you and your family normally enjoy?”

--multiple responses allowed--

--rank ordered from highest usage to lowest usage--

	Full Sample [%]	Baker [%]	Scotlandville [%]	Plank Rd. East [%]
Playground	58.7	54.2	67.8	64.6
Walking / Exercise	51.2	53.4	49.2	45.8
Basketball	48.3	44.8	76.3	33.9
Picnicking	38.2	42.9	25.4	35.4
Dog Park	30.2	31.5	30.5	26.2
Swimming Pool	29.1	29.6	42.4	15.4
Baseball / Softball	29.4	23.6	64.4	15.4
Fishing	26.6	26.6	13.6	38.5
Green Spaces	23.9	22.7	32.2	20.0
Tennis	17.4	16.8	23.7	15.4
Indoor Activities	15.6	12.8	25.4	15.4
BREC Programs	12.5	8.9	20.3	16.9
Sand Volleyball	5.5	4.9	8.5	4.6
		N=203	N=60	N=65

Table 4 (to be read vertically)

- ➔ The *Playground* is the most popular activity at BREC parks – enjoyed by 58.7% of the households in our sample.
- ➔ Walking / Exercise are the next most named activities [51.2%].
- ➔ *Basketball* and *Picnicking* are also popular activities enjoyed at BREC Park by 48.3% and 38.2% of community residents respectively.

Demographic Analysis:

- ➔ As age increases the likelihood to *Walk / Exercise* increases (until you reach 65+), however, *Walking / Exercise* is a popular activity at BREC parks for all age groups.
- ➔ As can be expected, those with children are significantly more likely to visit *Playgrounds*. And, as the number of children in the household increases, so does usage of both – up to 4 children in the home.
- ➔ *Basketball* is enjoyed the most by 18-24 year olds [54%]. In fact, for all responses by individuals up to age 45 we see Basketball being named as enjoyed at a BREC park by approximately 50%. Only after age 45 does this begin to decline.
- ➔ *Picnicking* is least popular with residents in the community age 18-24 and those over age 65. All other age groups show rather consistent usage of approximately 35% – 40%.
- ➔ Fishing appears to be more popular among persons over age 45.

B. Participation in Golf

Question: “Do you or any member of your household play golf at any of the BREC parks?”

Question: “How often do you or members of your household play golf at BREC Golf Courses?”

“Do you or any member of your household play golf at any of the BREC parks?”					
	Full Sample [%]	N	Baker [%]	Scotlandville [%]	Plank Rd. [%]
Yes	5.5	18	13.3	13.6	8.5
No	94.5	309	86.7	86.4	91.5
	100.0%	327	N=203	N=60	N=65

Table 5 (to be read vertically)

- ➔ Percy & Company surveyed 327 households within a two mile radius of Greenwood Community Park and interviewed 18 households that had a golfer in the residence. In other words, approximately one in twenty households has a family member that plays golf at one of the BREC golf courses.
- ➔ Most of these golfers were Males [16 of 18].
- ➔ Those under age 25 are less likely than those in other age groups to play golf at any of the BREC parks – especially compared to those age 35+. [14 of 18 were 35+ years of age.

“How often do you or members of your household play golf at the following BREC Golf Courses?”

--asked only to those who play golf at BREC parks--

	Once/week or more	Several Times / Month	Several Times / Yr.	Rarely or Never
J.S. Clark @ Greenwood	5	1	2	10
Dumas @ Greenwood	2	2	3	11
Beaver Creek	1			17
Howell Park	1		2	14
City Park / Brooks		1		17
Santa Maria				18
Webb	1		1	16

Table 6

- ➔ Of the 18 households in our sample that play golf at BREC parks, Clark @ Greenwood appears to get the most play – followed by Dumas. Most appear to be infrequent golfers.

C. Visits to BREC's Baton Rouge Zoo

Question: “How often do you or members of your family visit BREC's Baton Rouge Zoo?”

Question: “When was the last time YOU visited the Zoo?”

Question: “When was the last time a family member visited the Zoo?”

Question: “Is there a reason you don't visit more often?”

Question: “What can BREC do to make you want to visit the Zoo more often?”

How often do you or members of your family go to BREC's Baton Rouge Zoo?

	%	N
Once Each Month	3.1	10
Several Times Each year	23.9	77
Every Two or Three Years	20.8	67
Rarely	24.2	78
Never	27.9	90

Table 7

- We asked this question in two ways to cross-reference responses. As you can see above, approximately one-quarter claim to visit yearly – or more often [27%].
- Persons under age 35, females with children in the household are the most frequent visitors.

When was the last time YOU visited the Zoo?

When was the last time a Family Member visited the Zoo?

	You?		A Family Member?	
	%	N	%	N
Within the Last Month	7.1	22	9.5	27
Within Last year	23.3	72	20.8	59
1-4 Years Ago	18.7	58	16.6	47
5 or More years Ago	15.5	48	17.3	49
Don't Know / Can't Recall	34.9	109	35.7	101

Table 8

- As you can see above, approximately 30% of the households surveyed claim to have visited the zoo within the last year, however, fully 50% have not visited in the last 5 years.
- Younger persons [25 to 45 years of age], Females and having 1-3 children in the home appears to correlate to visit frequency.
- The Baker and Plank Rd. areas show higher rates of visitation to the zoo than does the Scotlandville community.

Is there a Reason You don't go to the Zoo more often? What can the Zoo do to make you want to visit more often?

Reason You Don't Visit Zoo:

- No Reason / Can't Say – 110
- Not Enough Time / Work – 19
- Zoo is more for Kids – 12
- Not Exciting / Boring – 11
- Don't Like / Not interested in Animals – 11
- Need More animals – 9
- Just Not Interested – 8
- Kids are Grown – 7
- Transportation – 3

What Can the Zoo do?

- No Suggestion / Don't Really Know – 100
- Get More Animals – 38
- More Activities / More Excitement – 9
- More / Better Food choices - 7
- Pamphlets / More Info – 6
- Free Admission - 5
- Get Aquarium / Sharks – 3
- Let Us Feed the Animals – 3
- Petting Area – 3

D. Preferred Greenwood Park Enhancements

Question: “In the **Greenwood Park Complex** BREC has over 600 acres of land dedicated for use by the community. BREC is **considering** changes to these facilities to strengthen the park’s overall amenities and provide the best use of the park for the community to visit and enjoy. Please tell us how important each of the following proposed park enhancements would be to you and your family for future recreation. *Please say ‘very important’, ‘somewhat important’ or ‘not important’.*”

Question: “*From the above list of enhancements, which would be the three most important to you and your family?*”

Note: Respondents were given a page of conceptual illustrations of park amenities to help them understand each.

“How important are each of the proposed park enhancements to you and your family for future recreation at Howell Park?”

-- rank ordered from Most Important to Least Important --

	Very Important [100] [%]	Somewhat Important [50] [%]	Not Important [0] [%]	Don't Know / Unsure / No Response	MEAN (100-Point Scale)
Adventure Playground for Children	85.9	9.4	2.8	1.9	90.6
Water Park / Swimming Pool	83.6	10.4	4.1	1.9	88.8
Paved Walking / Jogging Trails	79.3	12.4	7.0	1.3	85.5
Outdoor Basketball Courts	78.0	12.9	7.6	1.6	84.4
New Recreation Center	75.8	16.4	5.3	2.5	83.9
Picnic Area / Horseshoe Area	76.7	14.1	6.6	2.5	83.8
Open Green Space / Large Free Play Area	75.8	14.8	7.2	2.2	83.2
Large, Stocked Fishing Lake with Piers	75.5	14.7	6.9	2.8	82.9
Small Event Facility With Indoor and Outdoor Space	73.5	15.8	7.7	2.9	81.5
Conservation Area / Nature Trails	70.6	19.9	7.3	2.2	80.6
Practice Track	70.5	18.5	9.1	1.9	79.8
Outdoor Fitness / Stretching Equipment	69.3	20.6	8.5	1.6	79.6
Amphitheater for Outdoor Concerts and Events	70.3	17.0	10.1	2.5	78.9
Camping Area	70.2	17.2	10.0	2.5	78.8
Conference Center	66.9	17.0	13.2	2.8	75.4
Mud Racing [For Bikes and Running]	59.6	18.1	17.8	4.4	68.7

Table 9 (to be read horizontally)

“From the above list of proposed park enhancements, which would be the three most important to you and your family for future recreation at Greenwood Park?”

	1 st Mention	2 nd Mention	3 rd Mention	Total Mentions
Adventure Playground for Children	84	24	27	135
Water Park / Swimming Pool	35	46	23	104
Large, Stocked Fishing Lake with Piers	29	17	21	67
Paved Walking / Jogging Trails	10	27	26	63
Picnic Area / Horseshoe Area	18	15	21	54
New Recreation Center	14	17	19	50
Outdoor Basketball Courts	15	13	20	48
Camping Area	18	13	13	44
Conservation Area / Nature Trails	5	13	11	29
Practice Track	7	11	10	28
Outdoor Fitness / Stretching Equipment	8	7	7	22
Conference Center	4	12	2	18
Open Green Space / Large Free Play Area	3	8	7	18
Mud Racing [For Bikes and Running]	3	3	5	11
Small Event Facility With Indoor and Outdoor Space	4	2	3	9
Amphitheater for Outdoor Concerts and Events	1	4	3	8

Table 10

‘Other’ Suggestions from Above:

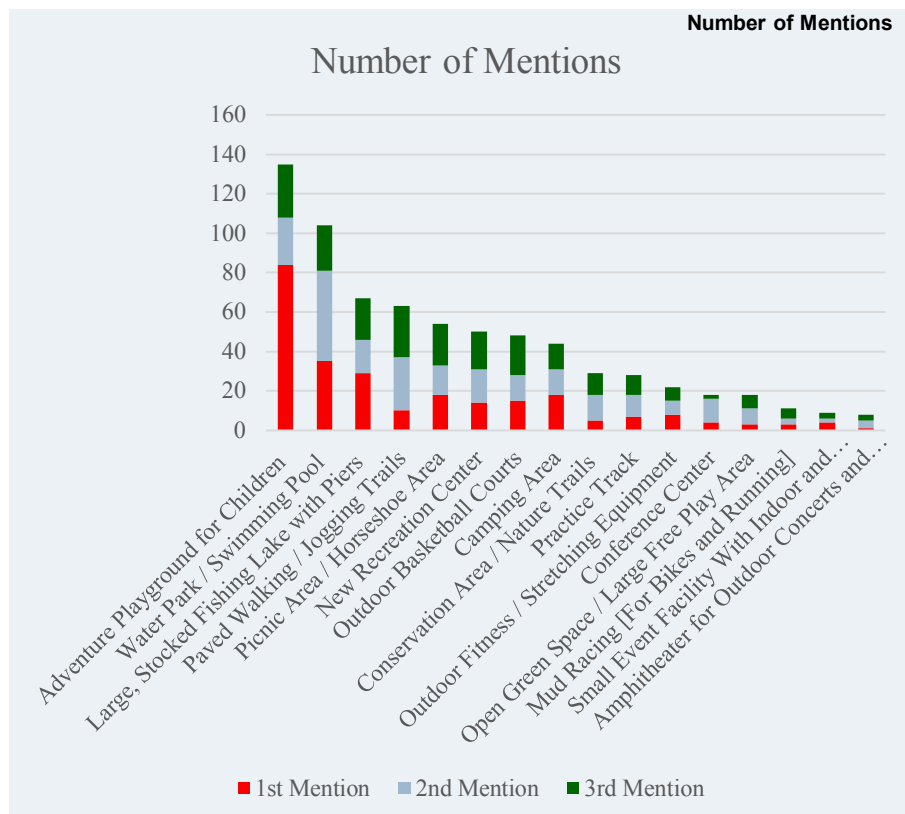
- Rock Climbing Wall – 3
- Yoga Center / Classes– 2
- Dance Classes – 2
- New Gym – 2
- More Programs for Kids – 2
- Covered Picnic Areas – 2
- More Swings and see Saws – 2
- Gardening Area – 2
- Football Field – 1
- Party Area - 1

- ➔ *An Adventure Playground for Children* is the most preferred enhancement for the proposed redesign of Greenwood Community Park. This amenity had both the highest rating of 'Importance' as well as the most first-choice mentions.
- ➔ *A Water Park / Swimming Pool* was the next most mentioned enhancement – also the second rated in both importance and mentions.
- ➔ While *Paved Walking / Jogging Trails* is rated third in importance and a *Large Stocked Fishing Lake* is rated 8th in 'Importance', the lake becomes 3rd most mentioned enhancement and the trails moves to 4th in overall mentions.
- ➔ The next most desired enhancements would be *Basketball Courts*, *Picnic Areas* and a *New Recreation Center*.

Demographic Analysis:

- ➔ Females, those with children, and those in the 25-34 age group have a tendency to give increased importance to all of the future park enhancements – but particularly the *Adventure Park* and *Water Park*.
- ➔ *Paved Walking and Jogging Trails* are most important to persons over age 35 years.
- ➔ The *Fishing Lake*, while important to all groups, increases in importance as one's age increases.
- ➔ *Improved Picnic Areas* are important to all, but more so to persons with children and over the age of 25.

Greenwood Park Complex BREC



Top Ten	Total Mentions
Adventure Playground for Children	135
Water Park / Swimming Pool	104
Large, Stocked Fishing Lake with Piers	67
Paved Walking / Jogging Trails	63
Picnic Area / Horseshoe Area	54
New Recreation Center	50
Outdoor Basketball Courts	48
Camping Area	44
Conservation Area / Nature Trails	29
Practice Track	28

Table 11

IV. SAMPLE DEMOGRAPHY

The following charts present the demographic breakdown of the 327 survey respondents on six attributes – gender, age, race, number of children living in household, number of adults in household and type of housing.

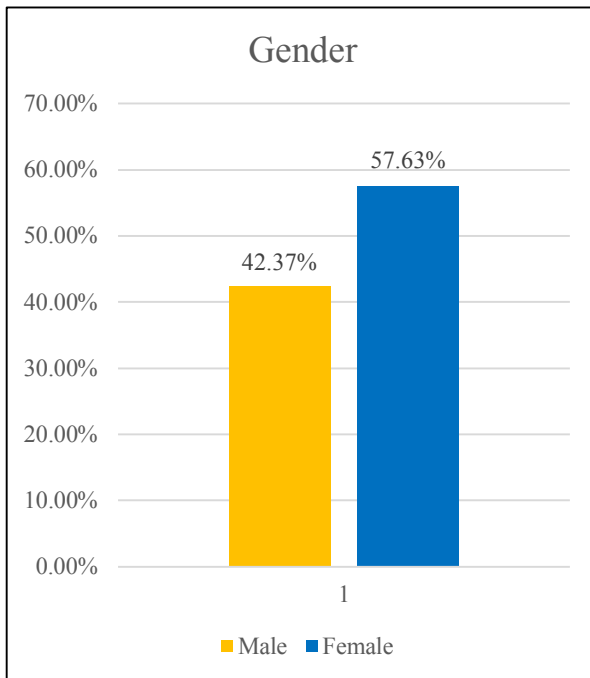


Chart 1

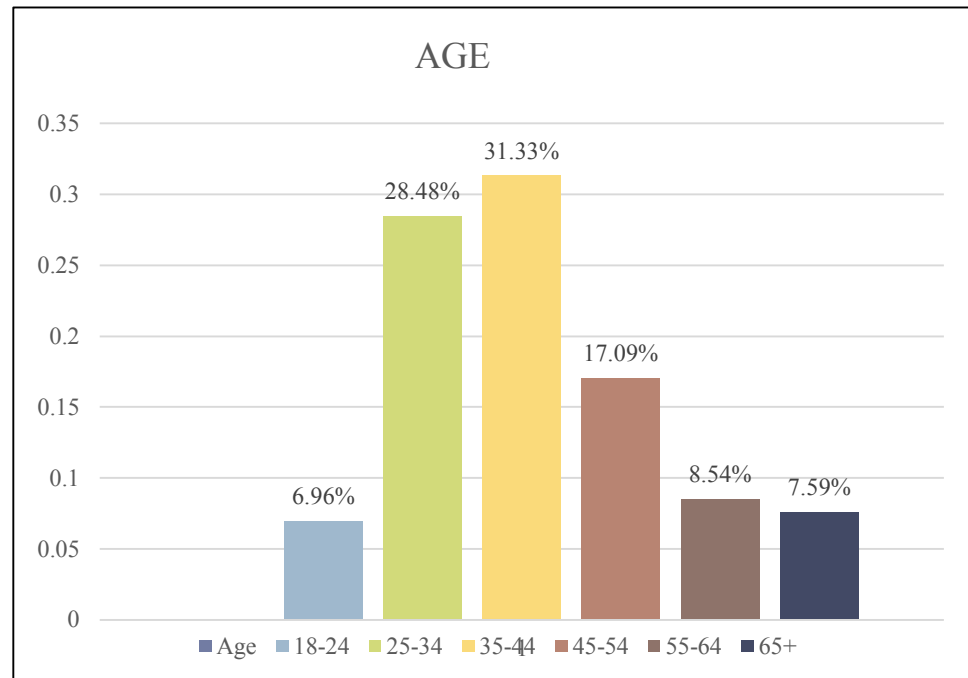


Chart 2

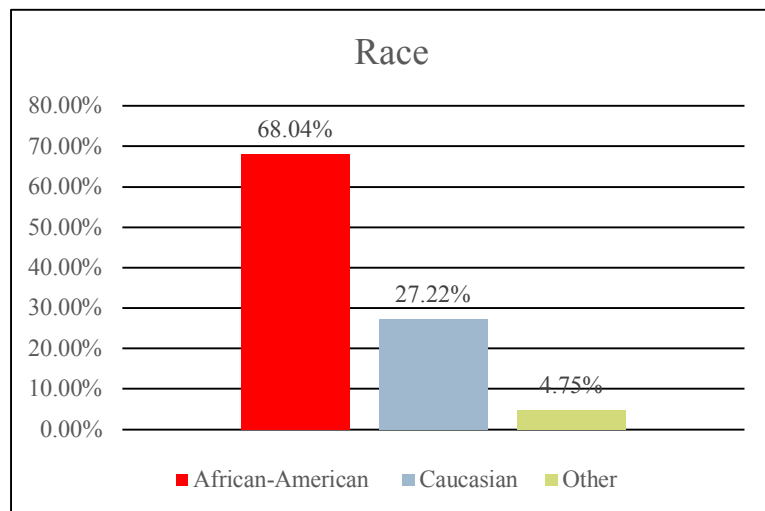


Chart 3

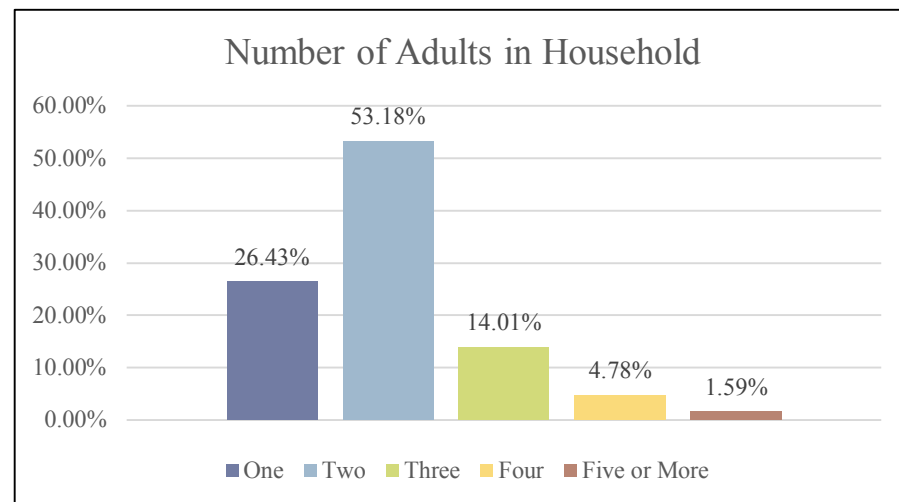


Chart 4

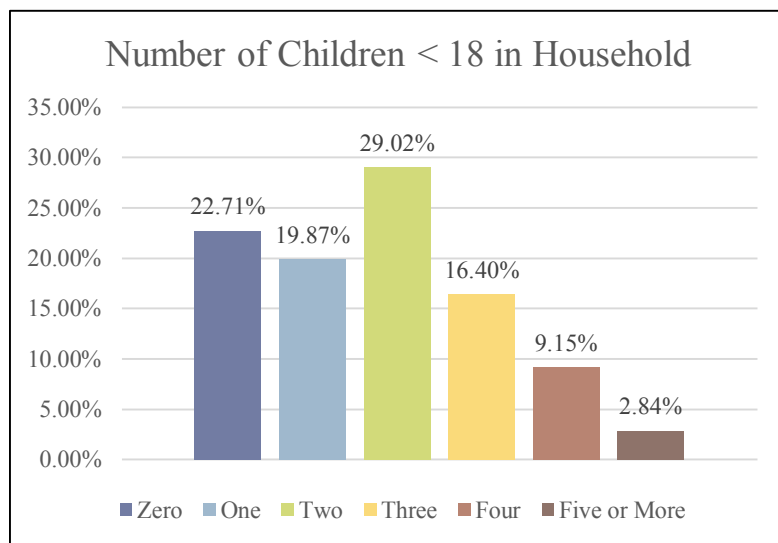


Chart 5

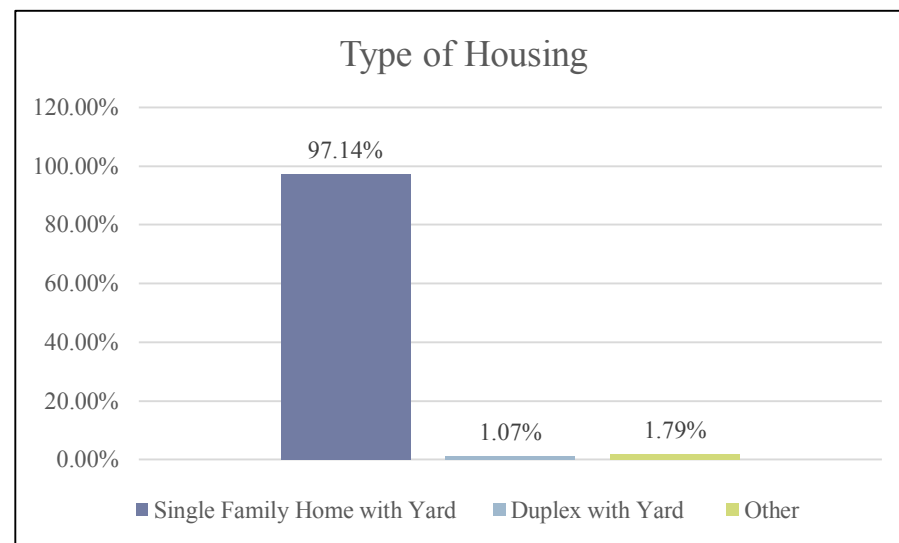


Chart 6

BREC Golf Courses Financial Study and Review of Operations



Prepared For:

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December, 2014

BREC Golf System Financial Study and Review of Operations



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Introduction and Executive Summary

PURPOSE

National Golf Foundation Consulting, Inc. (“NGF Consulting” or “NGF”) was retained by The Recreation and Park Commission for the Parish of East Baton Rouge (“BREC” or “Parish”) to assist in evaluating the operational and economic performance of the Parish’s seven public-access golf facilities: Santa Maria Golf Course, Beaver Creek Golf Course, Dumas Golf Course, Webb Memorial Golf Course, City Park Golf Course, Howell Park Golf Course and J.S. Clark / First Tee of Baton Rouge. BREC is seeking to have a full strategic review of the golf system and evaluate the long term potential of each of these facilities and the system as a whole. The following NGF report details findings and recommendations on the overall BREC golf system and each individual facility. In addition, the NGF team has detailed the overall economic condition of the BREC golf system and the market environment in which each facility operates, and has provided a set of recommendations for each individual facility and the system in its entirety.

BACKGROUND

The Recreation and Park Commission for the Parish of East Baton Rouge is operating seven golf courses spread out over the Parish of East Baton Rouge. These facilities include high quality, championship golf courses (like Beaver Creek and Santa Maria), to mid-level 18 and 9-hole golf courses (like Dumas, City Park and Webb Memorial), to lower-end 18-hole golf courses (Howell Park) and a beginner-oriented 9-hole learning facility at J.S. Clark. The system dates back to the original development of City Park Golf Course in the 1920’s. The Parish then added Webb Memorial (1930), followed by J.S. Clark (1951), Howell Park (1957) and Dumas (1960) in the 1950-1960 period. More modern courses were added at Santa Maria (1986) and Beaver Creek (2002). The 9-hole J.S. Clark course was modified into a full First Tee facility in the early 2000s. In 2011, the Parish added a new clubhouse at the Dumas Golf Course, although this facility was designed to be multi-purpose and serves adjacent park elements in addition to golf. As a result, the Parish is now operating a widely diverse system of golf courses that vary in pricing from value to moderate and offers “something for everyone,” from the beginner all the way up to seasoned golf professionals.

In the last several years, the economic performance of the BREC golf system has declined, leading to stress within the system and a worsening of physical conditions at the golf courses. In reviewing the BREC Golf system, it is clear that these golf courses are important to BREC, and add value to the Parish’s overall park system. As a whole, the golf system was able to generate approximately \$3.6 million in total on-site revenue in FY2013. With total basic operating expenses around \$4.09 million, the combined seven-facility golf system is operating with revenues that are not sufficient to cover the basic day-to-day expenses, before the addition of other Parish expenses such as overhead, internal fund charges and depreciation. This basic financial condition is not uncommon in municipal golf across the U.S., although the majority of municipal golf course operations are able to cover on-site expenses, but not able to cover all direct on-site expenses AND large depreciation or debt service (only 20% can cover debt and depreciation).

NGF REVIEW – 2014

In 2014, NGF Consulting was retained by BREC to assist with evaluating the Golf System and to make recommendations to help ensure the long-term viability of the system. This includes a thorough review of the system on an 'as-is' basis, as well as an examination of the system's capital needs and effects of deferred maintenance. It is expected that the results of this NGF study will be used by the Parish as a guide for the future of the golf system, and to help prepare a more formal master-plan of needed improvements and the priority and sequencing of such improvements. The review includes an evaluation of the system as it is presently operated, although alternative structures, both in terms of number of facilities (repurposing) and management structure, have been considered by the NGF team.

The findings and recommendations presented by NGF in this report are based on NGF Consulting experience, knowledge of golf industry best practices, and a review of each facility. NGF completed tours and meetings with key personnel (at each property and administration) in May and June of 2014.

NGF activities completed to date include meetings with BREC senior staff, Golf System staff, the Golf Advisory Committee, and staff at each of the seven BREC golf properties. In addition, the NGF team hosted a public meeting on golf in Baton Rouge and we conducted a survey of golfers who use the BREC facilities. These meetings involved substantive discussions about all key aspects of BREC Golf operations, as well as detailed reviews of each subject golf course. Further, the NGF consultants completed seven separate in-depth tours / inspections of each facility with complete interviews of each on-site manager and golf superintendent.

The key components and issues of this report include:

- Overall condition and operating efficiencies of BREC Golf
- A review of golf industry standards and norms of operation
- Status of the broader Baton Rouge market area, with focus on external issues that can affect public golf operations, including the balance between demand and supply
- A comprehensive review of each BREC Golf course and its present physical condition and capital needs
- A careful estimate of the cost of capital needs at each facility
- An estimate of realistic economic potential of the BREC Golf system and its ability to fund needed capital improvements
- Benchmarking BREC Golf operations with industry standards and norms
- A review of alternate models of operation (i.e. privatization)

The NGF consulting engagement was managed by Richard B. Singer, Director of Consulting Services, with assistance from other NGF staff including: John S. Wait, Senior Associate Consultant; Clark Brown, Director of Research; and Judy Cook, Consulting Administrator. In addition to meetings with Baton Rouge officials and golf course personnel, the NGF consultants collected materials to aid in understanding the local market area, weather data, other regional municipal golf operations, and golf operations in general. NGF also collects considerable information and data on the golf industry on an ongoing basis as a regular part of our organization's work, and much of this information and data is presented throughout this report.

SUMMARY OF KEY FINDINGS

BREC is operating seven separate golf facilities with a wide variety of offerings and in a wide variety of locations, but all generally suffering economically. Although the golf system as a whole was able to generate approximately \$3.6 million in total on-site revenue in 2013, approximately \$1.6 million (45%) was generated by one facility – Santa Maria GC. The system has significant positives that have been documented by NGF in this report, but we have also observed some aspects of this golf system, the most important of which is the larger park system that controls the golf courses and the general operation of the golf system as a public accommodation, rather than as a business enterprise. The NGF review shows that BREC Golf should change to be more of an “enterprise” operation, which will help BREC Golf quickly respond to business needs and trends.

Of particular note by the NGF consultants is the continuing reduction in resources allocated to the golf courses, both in terms of adequate personnel and financial resources. BREC appears to be ‘budgeting to revenues,’ as opposed to providing appropriate needs and resources to the golf courses. This has become more common in economically-troubled municipal golf systems, but NGF can state firmly that budgeting to revenues could have an adverse effect on business operations. If conditions worsen, the demand for golf will also decline, thus leading to more budget cuts and a downward spiral could be the result. Put simply, the key recommendation from NGF to BREC is that in golf it is impossible to cut your way to success. It is only through new commitment from the Parish, both in terms of day-to-day resources and capital investment that this golf system can improve its economic condition. While NGF cannot state with certainty that the BREC golf system can be “profitable,” we strongly believe that the recommendations contained in this report will help improve the condition of the system and help the administration show the taxpaying public that BREC is doing all it can to maximize the economics of golf and minimize the level of required taxpayer support.

This executive summary provides an “at-a-glance” summarization of the full NGF review, detailing the main findings and NGF recommendations for the BREC golf system. Additional details and support data can be found in the full body of our report and its appendix.

Key Findings on Golf System and Facilities

In reviewing the BREC golf system in early 2014, the NGF Consulting team found:

- Generally poor maintenance conditions at all of the BREC golf courses, likely due to recent reductions in maintenance expenses (there has been improvement since the NGF review in 2nd half of 2014).
- Managing with a heavier focus on numbers and budgets and not enough focus on operations, customer service and marketing.
- A need to maximize the use of the most up-to-date and modern technologies that can help improve golf operations and customer service (i.e. using all modules of the POS, tee times, websites, email, merchandising, etc.).
- Golf courses that are generally understaffed, leading to stress within the labor structure and added responsibilities of employees. One example is the overlap of managers and superintendents with responsibilities at multiple facilities.
- Economically, the BREC golf system did show improvement in 2013, but this seemed isolated to a few facilities, while others continued to struggle.

Review of Individual BREC Facilities

The NGF review of the seven individual golf facilities in the BREC system resulted in the following most salient findings on each individual facility:

Santa Maria GC - Given its location, the potential high quality of the golf course, its famous designer and its amenities, Santa Maria GC has the potential to become the premier public golf course in Baton Rouge, but some upgrade in both operations and physical condition is needed. Santa Maria has the strongest local demographics of any course in the BREC system and there is a high concentration of golfers in the immediate local market. This golf facility needs to upgrade the way it is marketed and promoted, so as to increase the awareness of the facility, not just to area residents, but to area tourists / visitors as well. Further, the property is ideal for large events and golf outings, and this segment needs to be promoted better as well.

Webb Memorial GC - Webb Memorial GC has the potential to improve its economic performance, but some investment will be required at this facility as well. Webb has an ideal set-up to be a lower fee, high volume golf producer for the BREC golf system. The local market environment is not as conducive to strong golf demand, but the location does have population density and proximity to central Baton Rouge. What is missing from Webb is any form of gathering space and food and beverage operation that would really help improve activity at this location. Thus, the key issue facing BREC in the Webb Memorial operation is how to best add to the volume of activity and increased yield at this facility through increasing the organized event schedule of tournaments, outings, charity functions, etc., even though this will require some upgrade to the golf course playing area and ancillary amenities.

Beaver Creek GC - Given the quality of the golf course at Beaver Creek, this facility has the potential to become one of the more popular premium courses in the region, and thus produce strong revenue. However, the course is located in a very rural part of the Parish and there is very little population in proximity. Thus, this facility will have to operate as a 'destination' property, meaning its target markets will not be living close by but will have to be enticed to come up for a quality round of golf. For this structure to work, the facility and all its ancillary amenities have to be of high quality for customers to justify the longer trip. An improved and expanded food and beverage operation (possibly a tournament pavilion) at Beaver Creek will improve the ability to attract additional golf events (tournaments, outings, etc.), thus enhancing revenue.

Historic City Park GC - Similar to Webb Memorial, the Historic City Park GC has location positives and opportunities for improvement, but the overall ambiance and beauty of City Park overall add to the potential of this facility. NGF expects that City Park will be able to generate rounds activity that is at least as strong as any other 9-hole golf course in this market area. The concern from NGF is that the Parish will view the lower revenues associated with a 9-hole operation as a reason to reduce expense budgets, putting the quality of the product (greens) even more at risk. The facility is such that it needs some upgrade to make it more appealing, but this facility also needs to be priced appropriately, meaning both fee increases for some customers and fee decreases for other customers may be in order. Again, like Webb, some investment in improving the F & B service at City Park should go a long way in improving facility performance.

Dumas GC – This golf course is showing the largest economic loss of any course in the BREC system, and has shown the greatest recent decline in activity. The reason is simple – the golf course will require significant capital to improve the conditions. Dumas GC is not well maintained and has limited irrigation that is needed to make it better. The new clubhouse is a nice attraction, but much of the use is from non-golfers using other Greenwood Park amenities. On the other hand, because of the quality of the park and clubhouse, Dumas does have the

potential to be a good performing facility, should the quality of the course be improved. As a result, the issue facing BREC in this operation is whether to make the investment needed to make Dumas a good performing course, or accept the inevitable losses the course in its present condition will bring. The proximity to J.S. Clark / First Tee provides some benefit to Dumas, but better tie-in between the facilities is needed. If BREC is to continue with Dumas as a golf facility, some commitment will be necessary to improve the condition of the golf course and make it more appealing to a wider range of customers, including the addition of a driving range in lieu of the proposed new 18th-hole project.

Howell Park GC - Given its facility type, location and the amount of improvement that will be needed at this property, it is clear to NGF that Howell Park GC will always represent a challenge for BREC. This property is not earning enough revenue to cover appropriate basic expenses, and it has significant capital needs that NGF is recommending be delayed until a formal plan for the future of the property can be completed. Given the popularity adjacent park elements, it seems to NGF that a full golf course is probably not an appropriate fit for this location and some re-purposing of the facility into more widely accepted park uses may be appropriate.

J.S. Clark/ First Tee of Baton Rouge - This 9-hole learning facility provides great potential for BREC Golf, both in terms of improving on-site revenue and the ability to increase the number of golfers in Baton Rouge, thus increasing revenue at other BREC Golf facilities. Some form of beginner-oriented facility will have a key place in the Parish golf system, and there is potential for greater revenue at the First Tee operation, either at this or another location. The result is a facility in the BREC system that can be a strong source for new player development, and, as such, economic losses at this type of facility should be acceptable to the Parish.

Survey

NGF completed a survey of golfers at each of the seven BREC golf courses in May and June of 2014. The NGF collected a total of 294 surveys, with about 239 (81.6%) of the respondents describing themselves as daily fee players, with the remaining 18.4% being “annual pass” holders. The six most significant findings showed that golfers at the BREC courses:

- Have a low level of satisfaction with BREC facilities, as the courses ranked in bottom 20% of golf courses nationwide in overall satisfaction. The highest level of satisfaction was for Santa Maria and the lowest satisfaction is at Dumas. These golfers are very concerned about the golf course conditions at all courses, especially the condition of the greens.
- Indicated they would play more golf at BREC facilities if the courses were in better condition.
- Are concerned about the quality and amenities associated with the food and beverage service
- Want to see improvement in the courses’ use of technology and pace of play
- See BREC Golf Courses as a good overall value
- Are concerned that staff is ‘stretched thin’ and thus not providing the best service.

Key Findings on Performance and External Factors

The NGF recognizes that in operating public golf facilities there are variables to the operation that can be controlled by the owner (Parish) and variables that cannot be controlled.

Uncontrollable factors include the location of the facilities, the demand for golf, the market competition, the condition of the national, local, and regional economy, and the weather. While some of the key controllable factors were identified above, other uncontrollable factors have been reviewed by NGF to help the BREC administration understand the challenges in the external market that affect demand for golf, and consequently golf revenue. The review and NGF recommendations contained in this report are designed to focus on the factors of the golf system that can be controlled by the Parish and to form the foundation of a system-wide business plan for golf. Some summary points about the overall market environment within which BREC Golf courses are operating include:

- BREC should understand that the external golf market will present challenges for strong economic performance of BREC golf courses. The total number of “core” golfers is declining and total spending on golf is declining with them. Similarly, the total number of golf facilities is greater than at the time BREC courses were developed, leading to a decline in per-course rounds and revenues. The NGF has also documented a rapid inflation in expenses to operate golf facilities.
- On the positive side, NGF has observed a growing trend of golf facility closures, with a reduction of 25% of the golf facility inventory in the local market area in the last ten years. The result of this should be a more favorable environment for surviving golf facilities.
- The greater Baton Rouge area has many attributes that tend to coincide with lower-than-average participation in golf. First, the incomes of residents in the Parish tend to be lower than is typical for golf participation, and there are large diverse populations in the Parish, many of which do not have a strong tradition in golf. Still, these factors are not universal in the Parish as a few of the BREC courses (Santa Maria and Beaver Creek in particular) are located in sub-markets with strong golf demand characteristics.
- Visitation related to State government, LSU, large corporations and tourism could contribute significantly to golf demand at BREC courses. This segment represents a sizable market opportunity for BREC Golf courses, and a market segment that should be actively targeted with a wide range of promotional activities.
- Relative to its population, Baton Rouge has a smaller number of golf courses leading to a more favorable ratio of households to golf courses. The result is a highly “inactive” golf population with demand estimates tending to exceed actual participation on the ground. Thus it appears that more will need to be done to stimulate greater activity from the local population to demand more golf through organized activities, groups, schools, leagues, programs, etc. The key target demographics for growth in golf activity at BREC courses will be increasing participation among younger people (under age 35) and from minorities and females. Facilities that have broader appeal to multiple segments (including beginners) tend to perform better in this market.
- The subject BREC courses have several key competitors, spread out in a wide geographic area. Overall, the BREC courses are priced similarly, but show lower quality playing conditions and have much lower activity (rounds). The total rounds played at BREC golf courses are well below national averages, but within range for the local area for only Santa Maria and Webb (Beaver Creek is coming close.)

NGF RECOMMENDATIONS

The NGF has prepared a comprehensive list of recommendations designed to help improve the BREC golf courses and make the system more efficient and more profitable. The NGF recommendations for the BREC Golf System include: (1) considerations for the basic operating structure and operating philosophy of the system; (2) changes and/or improvements that could be made to the physical plant of the system; and (3) specific ideas for improving the operation and marketing, and thus profitability of the system. The NGF recommendations are summarized here, with full detail on specific action steps detailed in the body of this report.

Overall System

- **Park Model vs. Business Model:** The NGF recommends that BREC seek to operate the golf system more like a business and less like a public accommodation. This does not mean that profit must be the highest and most important issue, but it does mean that BREC should operate the golf courses as efficiently as possible. This way, even if some form of taxpayer subsidy is required for the golf system, that subsidy will be as small as reasonable, due to the efficiency of operations.
- **On-Site Management:** The NGF has reviewed several options for the management of BREC golf facilities, ranging from continued self-operation, to concession agreements, to contracted management to leases. In our review, the NGF did not find that a change to any other model would significantly enhance the economic position of BREC golf, provided the Parish can enact improvements on their own. However, BREC may find that if action on the improvement recommendations contained in this report are not sufficient to improve the system's finances, than some form of single-source management agreement for the six primary golf courses may be the next logical step. This structure, if properly implemented, is believed by NGF to offer BREC an opportunity for improvement in both revenues and expenses, and allow for a streamlined operation with appropriate alignment of interests.

Repurpose Considerations

Another option for BREC to consider in helping to improve the financial condition of BREC golf would be to repurpose one (or more) of the system's golf courses for use other than golf. This could about through the repurposing of one (or more) of the five golf courses that sit on park property into more "passive" park space, or active in other sports (ball fields, etc.). It is clear that some of the BREC golf courses are not sustainable and our review suggests that the BREC system would operate at its optimum with a total of five golf facilities:

- One or Two premium 18-hole courses, with strong geographic diversity (opposite ends of the parish);
- One middle quality 18-hole course;
- One middle quality 9-hole course; and
- One facility with a driving range to be focused on the development of beginners and less-skilled players.

Candidates for Repurpose

Given the exceptions noted in our report (master-planned golf communities at Santa Maria and Beaver Creek + lager multi-purpose parks at City Park and Webb), the NGF team recommends that only three of the BREC facilities be considered for repurposing to other uses. These include (listed in order of priority for repurpose):

- **Howell Park.** This facility is clearly not sustainable “as-is,” and the community that surrounds it is not embracing the tradition of Howell as a golf course. Thus, other uses may make more sense.
- **JS Clark.** This facility has significant tradition and history, but is economically challenged and its primary elements could be moved to another location. BREC should consider a possible merger of elements at JS Clark to be combined with Dumas GC, if a new driving range were to be added at Dumas GC.
- **Dumas GC.** Dumas GC is not in ideal condition and will require substantial investment (at least \$850,000) to bring to an acceptable and marketable level.

NGF Recommendation

The NGF team’s recommendations on repurposing golf facilities:

- BREC immediately act to repurpose Howell Park GC into a use other than golf.
- Begin planning for the eventual repurposing of JS Clark, with the concept of moving the First Tee elements over to Dumas GC. This will require new investment in Dumas GC, especially in adding a new driving range.
- As golf facilities are repurposed out of golf, the resources (capital and staff) should not be eliminated, but be re-assigned to other BREC golf courses.
- There is a cost to close a Parish golf course, both in terms of direct capital remediation and ongoing maintenance. Parish data provided to NGF indicates the Parish spends over \$1,000 per acre per year on park maintenance, which would become a new expense to BREC for the closed golf course(s), if maintained as a passive park with no revenue (\$135,000 total for Howell Park).

Physical Improvement Recommendations

In recommending upgrades to the physical plant at BREC golf courses, NGF has divided our suggestions into two categories: (1) specific recommendations that apply to all BREC facilities; and (2) recommendations that are unique to each individual facility.

All Facilities

The NGF recommendations for all facilities include (details included in the body of this report):

- Making quality course conditions a priority
- Maintaining the appropriate staff and budget at each facility
- Committing to capital needs improvements
- Maintaining the courses with the appropriate quantity and quality of equipment
- Employing the appropriate expertise for properly maintaining golf courses

Upgrades by Facility

The physical upgrade needs documented by NGF total around \$2.94 to \$3.6 million, although a substantial portion of this is related to direct capital costs required at Howell Park (\$1.2 million) that may not be necessary if BREC considers a repurpose option. Below is the recommended list of physical upgrades to be completed at each facility in order of priority (estimated cost for each item provided in the body of the report):

1. All actions to improve playability of the courses, (tees, irrigation, bunkers, range, amenities)
2. Gym / Fitness conversion to banquet area at Webb GC
3. Add pavilion at Beaver Creek GC
4. Improve clubhouse facilities at Santa Maria
5. Convert the cart storage at City Park to a small snack bar/grill
6. Improve the grill facilities at Beaver Creek
7. Add driving range to Dumas (in lieu of re-do 18th hole)
8. Deck covering at Webb GC
9. All other Howell Park / Dumas upgrades (if Parish elects to retain golf at these sites)

The NGF recommendation for sequencing major items can be shown in the chart below:

Schedule by Facility	2014-15	2015	2016	2017	2018
Santa Maria GC	Playability items	Clubhouse			
Beaver Creek	Playability items	Pavilion		Grill upgrade	
Webb Memorial	Playability items	Gym/fitness Conversion			Deck
Dumas	Dr. Range				
City Park	Playability items		Snack bar conversion		
Howell Park	TBD				
JS Clark	TBD				

Basic Operational Recommendations

Additional recommendations regarding basic operations that apply to all BREC Golf facilities are provided and detailed in the NGF report. A summary of key recommendations include:

- **Enhancing Technology:** BREC must improve its use of technology in areas such as POS, email, databases, financial reporting and, of course, its website(s).
- **Enhancing Marketing:** This recommendation is widespread and covers many items. Ultimately, the future success of BREC facilities will be the system's ability to attract:
 - Tourists
 - Large Employers
 - Seniors
 - Women
 - Minorities
 - Juniors
 - Leagues

- **Fee Structure:** The NGF has prepared a full schedule of recommended green and annual pass fees. This includes a slight adjustment, both up and down, for various categories at various times of the day and week.
- **Enhancing the Customer Experience:** The NGF offers a wide range of ideas to help BREC work to improve the experience of its customers, working to create positive experiences, primarily by showing your appreciation for golf customers.
- **Staffing:** The NGF recommends that BREC seek to staff all positions presently funded by not active (18 positions in Golf are currently vacant). These positions could help to improve the maintenance condition of the golf courses and improve customer service.
- **Ideas for increasing Rounds:** The NGF reviews the three ways to increase play at BREC golf courses: (1) get more from existing customers; (2) take play away from other courses; and (3) develop new golfers. Ideas for increasing rounds in all three areas are identified.
- **Less-Traditional Segments:** As noted, the Baton Rouge market area has large populations that do not have strong tradition with golf. The NGF has offered ideas for helping BREC bring younger people to the game, with focus on minorities and women.
- **Leagues:** The NGF recommends working hard to expand existing leagues and create new leagues to stimulate activity at BREC golf courses.
- **Ancillary Revenue:** The NGF team has presented a wide range of ideas to help BREC enhance its direct sales in the areas of food and beverage, merchandise and driving range. These ancillary areas are important for both the direct revenue produced and the ability to attract additional rounds of golf.
- **Other Ideas:** In addition, we have presented several other ideas for helping the BREC golf system, addressing areas such as pace-of-play, third-party wholesalers, beverage carts, lessons/programs, family golf, and many more.

FINANCIAL OVERVIEW SUMMARY

NGF has prepared estimates of economic performance for each of the seven individual BREC Golf facilities at various rounds played totals (worst case, 2013 results, modest growth and best case). These estimates are prepared assuming expected 2014 inputs for revenues and expenses with variable rounds played. The analysis showed that if the BREC system is to continue “as-is,” it is likely that the net income from the golf system will remain negative, unless the system can increase activity to at least 173,000 total system rounds, or a 30% increase over actual 2013 activity. While this increase is achievable, it will require significant change in the operation, and likely require a professional operator that could be secured for the system via direct hire or management contract. This level of production will also require some capital investment in the facilities, as noted previously.

Full BREC System

A summary of the full system at various rounds activity is shown below. We see that the system is reaching a level of break-even on facility operations (without overhead) when the courses reach 173,000 rounds annually.

BREC System (7 Courses) Estimated Economic Performance* at Various Rounds Totals				
	Worst Case	Appx. 2013	Modest Increase	Best Case
Total Rounds	111,100	133,000	173,000	224,000
Revenue				
Admission Fees (Green Fees)	\$1,257,500	\$1,510,700	\$1,891,100	\$2,363,300
Equip Rental (Cart Fees)	738,100	883,400	1,133,100	1,456,100
Driving Range	98,000	119,900	150,400	186,400
Lessons	18,000	21,000	24,000	26,400
Developmental Golf / First Tee	18,200	24,400	39,000	58,500
Total Tournament	253,000	298,400	351,300	403,650
Merchandise	256,250	305,400	370,700	445,900
Passes	196,800	231,400	282,300	342,700
Other	5,600	6,900	8,700	11,300
Food & Beverage**	275,050	325,300	526,400**	646,800**
Total Revenue	\$3,116,500	\$3,726,800	\$4,777,000	\$5,941,050
Less:				
Direct Cost of Sales	\$352,400	\$417,800	\$597,800	\$735,900
Operating Margin	\$2,764,100	\$3,309,000	\$4,179,200	\$5,205,150
On-Site Facility Expenses:				
F & B Wages	\$95,000	\$95,000	\$165,000	\$192,500
F & B Non-Wages	\$17,000	\$17,000	\$28,000	\$32,000
Pro Shop Wages	\$795,000	\$910,000	\$980,000	\$1,080,000
Pro Shop Non-Wages	\$576,000	\$638,000	\$697,000	\$752,000
Maintenance Wages	\$1,140,000	\$1,265,000	\$1,430,000	\$1,605,000
Maintenance Non-Wages	\$690,000	\$750,000	\$875,000	\$995,000
Total Expense	\$3,313,000	\$3,675,000	\$4,175,000	\$4,656,500
Net Operating Income	(\$548,900)	(\$366,000)	\$4,200	\$548,650
*NGF Consulting estimate. ** assume some expansion/improvement of F & B operations at BC, W and CP				

BREC System W/O Howell Park and JS Clark

The estimates in this section show how the combined BREC system would look if the Parish were to commit to a program of repurposing underperforming golf courses Howell Park and JS Clark. NGF has considered the performance of the BREC golf system under the consideration that the Parish will cease golf operations at Howell Park beginning in 2015 and JS Clark beginning in 2016 with the land used as an open space park (ball/soccer fields, open space, bike trails, jogging trails, dog walk, Frisbee parks, etc.). This review was completed to show what the golf system would look like economically, assuming the other golf courses continue to operate “as-is.”

Our economic review of the option does show that the BREC Golf Division economic performance does improve with the closure of Howell Park and JS Clark. However, we note that this review still shows that while it is likely the system can cover all on-site expenses with activity at 2013 levels, the overall loss in the system after all administrative and overhead charges is likely to remain. As such, further study and careful consideration should be given to this course of action, especially as it related to moving First Tee elements over to Dumas. As noted by NGF, the optimal result with Dumas would be to move all First Tee activities over to Dumas and repurpose J.S. Clark.

BREC System (5 Courses w/o Howell + JS Clark) Estimated Economic Performance* at Various Rounds Totals				
	Worst Case	Appx. 2013	Increase	Best Case
Total Rounds	109,500	128,000	156,000	193,000
Total Revenue	\$3,170,200	\$3,731,950	\$4,614,000	\$5,569,550
Less:				
Direct Cost of Sales	\$361,200	\$423,400	\$594,400	\$715,500
Operating Margin	\$2,809,000	\$3,308,550	\$4,019,600	\$4,854,050
On-Site Facility Expenses:				
Total Expense	\$2,917,000	\$3,132,000	\$3,483,000	\$3,799,500
Net Operating Income	(\$108,000)	\$176,550	\$536,600	\$1,054,550
*NGF Consulting estimate. ** assume some expansion/improvement of F & B operations at BC, W and CP				

Summary Conclusion

It is our opinion that the Parish's golf system is at a very critical point in its history. Declining performance has not only created stress within the system, but has resulted in a limited reinvestment in the golf courses in terms of day-to-day maintenance and deferred capital repairs. The position the Parish is in is a familiar one to NGF. Additional or further budget reductions could affect the performance of the facility and end up reducing revenue by more than the cost savings, thereby accelerating the decline.

Yet, there is a lot of reason for optimism as well. Several of these golf facilities are well positioned within the community, and golfer sentiment is such that if improvement is made, they will return and play more. Still, the Baton Rouge area is not a particularly strong golf market at present, and so more 'hands-on' effort to stimulate greater activity in a reduced system is required to make BREC Golf work, and this includes reaching out to less traditional golf populations (like women and minorities), as well as existing (but underserved) markets like tourists, corporations and tournaments.

In summary, our findings are that the BREC is operating popular golf facilities with amenities that are good enough to generate close to \$3.6 million in revenue in 2013. The NGF found six key specific areas that we feel are the most significant contributors to the recent declines in economic performance of BREC Golf Courses:

1. Poor golf course conditions at BREC golf courses, especially the greens
2. A need for restructuring the operation and modernizing technology
3. Inadequate ancillary amenities at several facilities, including limited F & B
4. A need to improve marketing to include both passive and active marketing efforts
5. A need for streamlining staffing and park oversight where it makes sense
6. Uncontrollable factors such as recent recession and the general lack of golf 'tradition' within the local population

In review of the BREC golf system, NGF finds that action on these above items will provide the greatest relief of economic stress to the system, although working to consolidate the system under a single operator will also help to relieve some economic stress. Assuming it is in the best interest of the BREC for the golf system to remain viable, it is expected that these changes will provide some economic relief to the BREC Golf Fund.

The most important NGF recommendations for BREC Golf include:

1. Upgrade the physical condition of the golf courses and clubhouses
2. Modify the operational structure and employ professional management
3. Repurpose Howell Park and JS Clark GCs to a use other than golf
4. Improve technology and marketing
5. Enhance food and beverage service at all facilities
6. Make all the golf courses more appealing to less traditional golfers, especially women and minorities.

External Factors Affecting the Operation of Public Golf Courses

In this section of the report, NGF Consulting will provide a summary of important external factors that have direct effect on the operation of BREC Golf courses. This includes a review of local demographics and the economy, national trends in golf industry demand and supply and a specific estimate of golf demand in East Baton Rouge Parish and each BREC course's local sub-market. NGF will also provide a review of other golf courses in the market area that compete with the BREC Golf courses' market share. We will then provide a summary of these factors and how they relate to the continued operation of BREC Golf facilities.

DEMOGRAPHICS, ECONOMY AND WEATHER

NGF has examined certain factors that have the potential to affect the performance of BREC Golf courses. These factors are generally viewed as less-than-favorable for the golf system, as basic demand for the activity is mostly low, and even very low in some local sub-markets.

Demographic Analysis

With more than 442,000 people (2013 estimate), the Parish of East Baton Rouge has seen modest growth and incomes that are lower than the total U.S.

MSA / State / National Summary Demographics			
	East Baton Rouge Parish	Louisiana	U.S.
Population 1990 Census	380,107	4,210,278	248,584,652
Population 2000 Census	412,854	4,468,774	281,399,034
CAGR 1990-2000	0.83%	0.60%	1.25%
Population 2010 Census	440,171	4,533,372	308,745,538
CAGR 2000-2010	0.64%	0.14%	0.93%
Population Estimate 2013	442,698	4,616,295	314,419,291
Population 2018 Projected	448,905	4,823,590	328,556,267
CAGR 2010-2018	0.25%	0.78%	0.78%
Median HH Income (2013 Estimate)	\$47,317	\$44,713	\$51,804
CAGR = Compound Annual Growth Rate. Source: NGF Consulting, Tactician Corporation, Applied Geographic Solutions			

The local communities that surround each BREC Golf site have differing basic demographic characteristics. The market around Santa Maria has the highest median household income, but relatively low population. Howell Park is in the sub-market with the lowest income, but total population is relatively high. Most of the courses (Dumas, Webb, City Park, Howell Park and JS Clark are in markets with incomes that are 25% to 35% lower than the overall Parish. While these rings do not necessarily represent the true "market" for each BREC Golf course, the localized analysis does give an indication of the characteristics of the immediate local populations and the level of support that can be expected from the "fall-out-of-bed" markets that surround each property.

Local Population and Income 2013				
	Population		Median HH Income	
	3-Mile Ring	5-Mile Ring	3-Mile Ring	5-Mile Ring
Dumas Golf Course	27,887	62,270	\$34,974	\$38,080
Webb Memorial Golf Course	87,548	189,621	\$36,831	\$38,109
City Park Golf Course	77,092	154,257	\$33,474	\$35,169
Santa Maria Golf Course	23,634	80,478	\$90,166	\$85,271
Howell Park Golf Course	86,154	172,589	\$30,970	\$37,298
J.S. Clark / 1st Tee	28,960	68,212	\$33,905	\$38,929
Beaver Creek Golf Course	4,460	14,473	\$85,698	\$72,978
Source: NGF Consulting, Tactician Corporation, Applied Geographic Solutions. N/A = not available				

Key Economic Factors

East Baton Rouge Parish is the largest community within the Greater Baton Rouge MSA, with the City of Baton Rouge as its largest City and Parish seat. Following are some key observations highlighting the broader economy, transportation, and visitation characteristics of East Baton Rouge Parish. The overall findings are viewed as mixed, as the overall region shows strong characteristics related to low golf demand, but there are some elements within this community that relate to stronger golf participation, including the presence of large employers, key visitor attractions (state government, LSU), large retired military population and a general affection for parks and recreation. Some observations related to the local area economy in early 2014:

East Baton Rouge Parish

- Basic** - East Baton Rouge Parish has a population of 442,698 (2013 estimate), with growth projected to be 448,900 by 2018. The median household income in 2013 was \$47,317, compared to \$44,713 for Louisiana and \$51,804 for the total U.S. Most of the population of East Baton Rouge Parish lives in immediate surroundings of the City of Baton Rouge. The racial makeup of the parish was 49.5% white, 45.9% Black or African American, 4.6% other races. East Baton Rouge Parish has both the highest high school graduation rate, at 82.2%, and the highest percentage of residents holding at least a bachelor's degree, 33.3%, in the state of Louisiana.
- Weather / Climate** - Golf is an outdoor activity and thus weather will impact activity and revenue. NGF estimates that over 90% of golf rounds are played when the temperature is between 55 and 90 degrees. Rain, snow, and wind are mitigating factors that will reduce the number of playable days. The Baton Rouge area climate has mild winters, hot and humid summers, moderate to heavy rainfall, and the possibility of damaging winds and tornadoes yearlong. The area's average precipitation is 55.55 inches of rain and 0.1 inches of snow annually. With ample precipitation, Baton Rouge is fifth on the list of wettest cities in the U. S. As a result, golf can be played year-round but can be interrupted by periods of persistent precipitation. The area does get various severe storms (and hurricanes), like Hurricane Gustav in 2008. We also note the extreme drought that is presently affecting the Baton Rouge area and is impacting BREC golf courses.
- Economy** – Baton Rouge is a major industrial, petrochemical, medical, research, motion picture and growing technology center of the American South. The Port of Baton Rouge is the ninth largest in the United States in terms of tonnage shipped, and is the farthest upstream Mississippi River port capable of handling Panamax ships. Other observations:

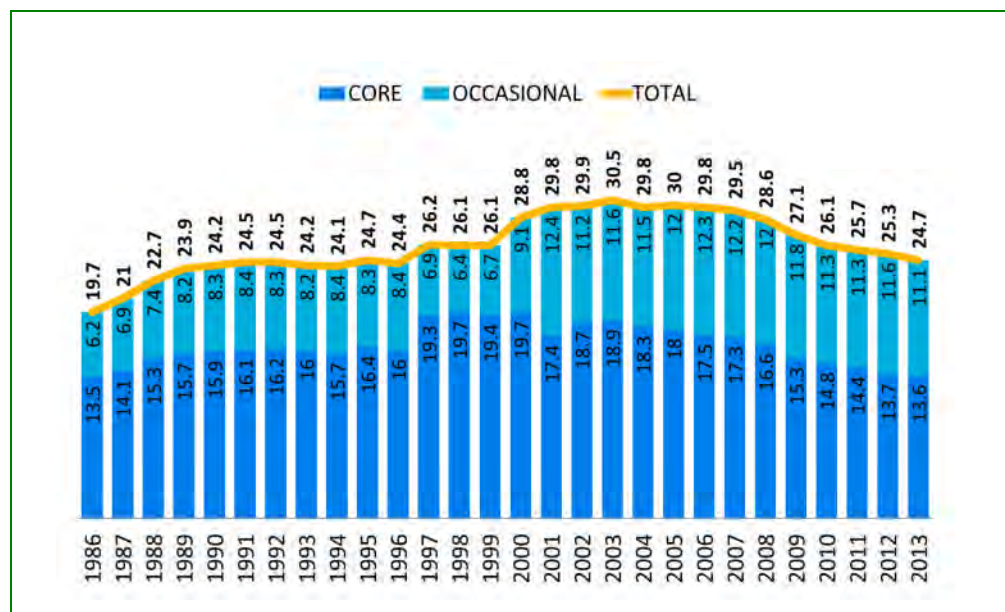
- Data extracted in July 2014 shows significant improvement in the area economy, with sales tax collections, retail sales and vehicle sales all at five-year highs in the Parish. The data also showed the Baton Rouge metro area was identified as having the best performing post-recession housing market among the 350 in the nation included in the National Association of Home Builders/First American Leading Markets Index report (April, 2014).
- East Baton Rouge Parish unemployment rate fell to 3.8% in February 2014, compared to 5.5% in 2013; U.S. unemployment was at 7.0%.
- Baton Rouge's largest industry is petrochemical production and manufacturing. The ExxonMobil facility in Baton Rouge is the second-largest oil refinery in the country; it is among the world's 10 largest. Baton Rouge also has rail, highway, pipeline, and deep water access.
- As well as being the state capital and parish seat, the city is also the home of Louisiana State University. One of the largest single employers in Baton Rouge is the state government (over 26,000 employees), which recently consolidated all branches of state government downtown at the "Capitol Park" complex.
- **Transportation** - Baton Rouge is connected by the following major routes: I-10 (Capital City Expressway via the Horace Wilkinson Bridge), I-12 (Republic of West Florida Parkway), I-110 (Martin Luther King Jr. Freeway), Airline Highway (US 61), Florida Boulevard (US 190) (via the Huey P. Long Bridge). To accommodate the rapid growth of Baton Rouge, sections of its freeways have been upgraded in recent decades and there are currently plans to create a tolled freeway loop around the metropolitan area. According to the 2008 INRIX National Traffic Scorecard, which ranks the top 100 congested metropolitan areas in the U.S., Baton Rouge is the 33rd-most-congested metro area in the country. This has implications for the BREC golf facilities as the market draws will tend to be limited to more local neighborhoods.
- **Airport** – Located 10 minutes north of downtown near Baker, the Baton Rouge Metropolitan Airport connects the area with the four major airline hubs serving the southern United States. Commercial carriers include American Eagle, United Airlines, Delta Air Lines and US Airways Express. Nonstop service is available to Atlanta, Dallas-Ft. Worth, Houston, Memphis and Charlotte. For the 12-month period ending November 30, 2008, the airport had 111,257 aircraft operations, an average of 304 per day.
- **Military**– The Baton Rouge area is home to several key military installations and units, several of which have been involved in recent U.S. conflicts. The area also has a large retired military population, and this has clearly impacted participation at BREC golf courses.
- **Parks** - The overall Baton Rouge area (and BREC in particular) is known for its high quality parks. Baton Rouge has an extensive park collection, with the largest being City Park near LSU. City Park is currently undergoing improvements and is part of a program to try and preserve the historic nature of the park and its golf course.

GOLF MARKET SUPPLY AND DEMAND INDICATORS

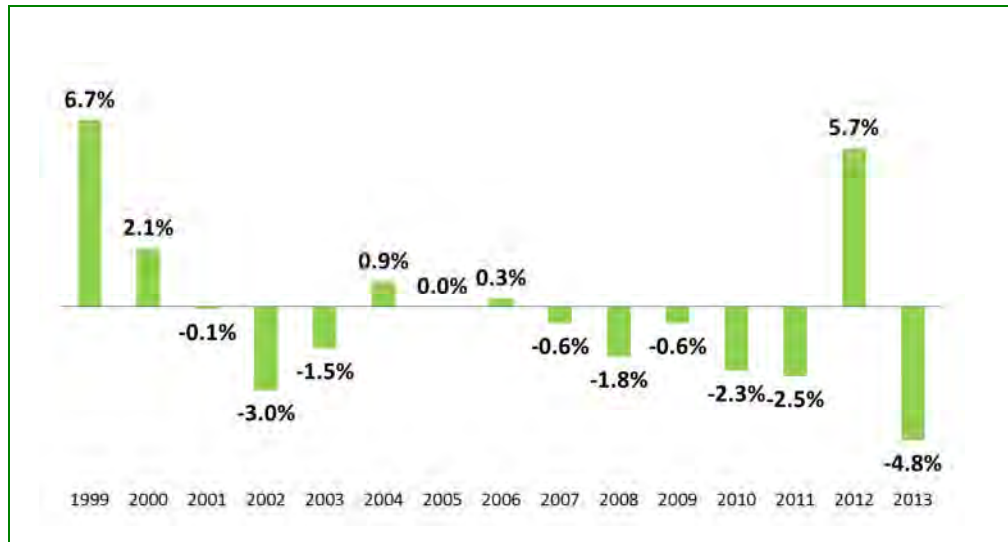
NGF made several key observations regarding the local BREC area golf market, related to national trends, local demand/supply, and area golf facility competition.

National Trends in Golf

Golf participation in the U.S. has grown from 3.5% of the population in the early 1960s to about 9% of the population today. NGF estimates that the number of golfers fell in 2013 to 24.7 million (decline of 2.4% from 2012). In the longer term trend, the industry has seen a loss of some 4.7 million golfers since 2005. This loss is due to both a decline in beginners and a problem in retention – golf is losing more people than it is gaining in beginners. For research purposes, a golfer is defined as a person age 6 or above who plays at least one round of golf in a given year.



2012 Rounds Played – The Largest Single-Year Jump since the Millennium - The most influential factor in the golf economy in 2012 was the 5.7% increase in rounds played, due in part to favorable weather (increased playable days). The resulting increase of 27 million rounds took the national total to about 490 million, subsequently falling by 4.8% to 466,500,000 for 2013. For the longer term, rounds have declined by approximately 11%, or 55 million, since 2003.



Golf Industry Outlook for 2014 - Golf continues to recover slowly from the recession of 2008-2011, though this recovery has been very modest to date. The outlook for 2014 is for modest sales growth in golf consumer products and services, and golf course equipment and supplies. Rounds played are expected to remain flat at 2013 levels, as the number of play days is unlikely to match those of 2012. Course closures will continue to outpace openings significantly, resulting in another year of supply correction with negative net growth.

2013 Facility Openings and Closings - U.S. golf course openings remain at historic lows, as NGF recorded only 13.5 openings in 2012, compared to 156.5 golf course closures, measured in 18-hole equivalents (18HEQ). As in recent years, closures were disproportionately lower priced public facilities (68% of total closures). According to NGF data, since the market correction in golf course supply began in 2006, there has been a cumulative net reduction of 499.5 golf courses (18HEQ), which represents a drop of 3.3% off the peak supply year of 2005.



Local Golf Course Closure – In keeping with a growing nation-wide trend, NGF estimated that as many as four golf courses have closed in East Baton Rouge Parish since 2003, including 18-holes at Briarwood GC (closed 2008), Shenendoa CC (2005), Fairwood CC (2006), and Legacy at Bonne Esperence (2013). These closures represent a significant proportion of golf courses that have closed in the Parish, reflecting a tough local golf economy.

Capacity

As we will present later in the 'Competitive Analysis' section, current rounds played volumes at some BREC courses are within the norms for public 18-hole golf facilities operating in the Baton Rouge area, but most are well below these norms. Based on the market review and the market positioning, location, and quality of each BREC golf facility, NGF Consulting has estimated a reasonable number of expected yearly rounds for each facility:

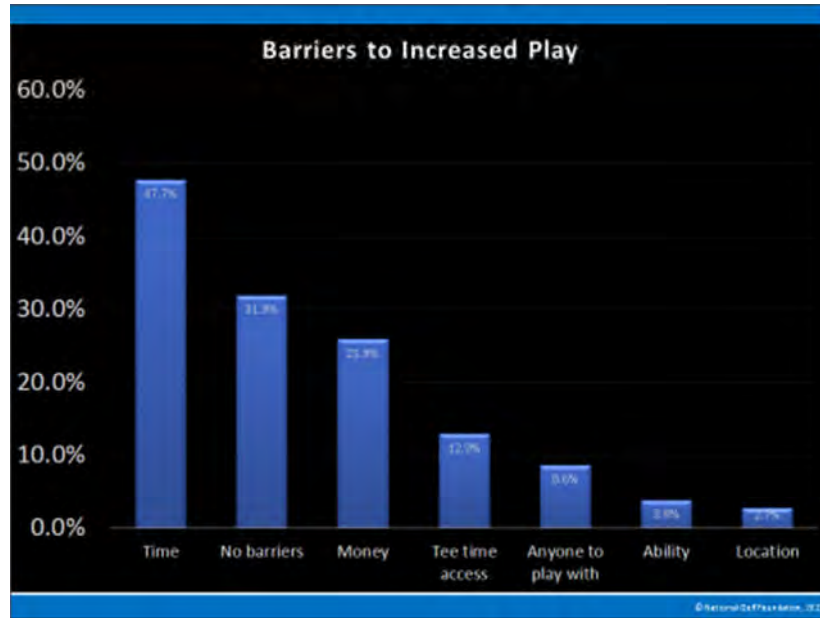
BREC Golf System NGF Estimated Realistic Total Rounds Capacities	
Golf Facility	Realistic Capacity
Santa Maria GC	44,000 rounds annually
Beaver Creek GC	35,000 rounds annually
Webb Memorial GC	45,000 rounds annually
City Park GC	30,000 rounds annually
J.S. Clark / First Tee BR	20,000 rounds annually
Dumas GC	40,000 rounds annually
Howell Park GC	30,000 rounds annually

Tendencies and Preferences that Influence the Demand for Golf

Through NGF research, it is clear that certain characteristics are predictable, as highlighted below:

Just the Facts: The Industry	
90% Rounds	Live or work within 30 minutes of golf course
15% of Customers	Core golfers generate 60% of revenue
Defectors	50% play course once and don't return within 12 months
Distinct Customers	6,000 golfers play 4 to 7 courses annually
Barriers to playing more	Time or "No Barriers". Money is cited less than 20% of time
Game	Caucasian, Well-to-do, Older than General population

In, essence, 60% of a golf course's revenue is generated from 15% of the customers. This 15% represents an average of 6,000 distinct customers who play 4 to 7 different golf courses, resulting in a total of more than 30,000 rounds per year played at the average golf course. When asked to identify the barriers to increased play, survey respondents cited the "lack of time" or, surprisingly, "no barriers," answers common to every survey by NGF.



We note that the expense of the sport is ranked third with 25% indicating it as a key barrier. This we can see that continued discounting and lowering price may not be the key to increased participation. The key to financial success in managing a golf course is not focusing on price but rather the value created by the experience offered. Where the experience equals or exceeds the rate charged, customer loyalty is created. In conducting surveys, and as confirmed in the survey conducted for this review of BREC Golfers, NGF Consulting realizes that golfers select a course based on the following criteria:



Estimated BREC Golf Market

NGF Consulting uses actual data from competing golf facilities to provide documentation of the local golf economy, and this information is presented in this report. NGF Consulting also utilizes predictive models as benchmarks for estimating potential market strength. The methodology for determining the relative strength of the subject market is described in the following section.

Predicted Local Golf Demand

The **Golfing Household Index** is based on Predicted Number of Golfing Households, and compares golfing household participation in a particular geography to the national base index of 100. The **Rounds Index** is based on Predicted Number of Rounds, and compares the propensity of rounds played per household in a particular geography to the national average rounds index of 100.

Local Golf Demand Indices

The golf demand indices for each of the eight BREC Golf system sub-markets are above the U.S. standard for golf participation (U.S. Standard Index = 100), and also higher for rounds played. For comparison, NGF has provided the indices for Baton Rouge MSA and the State of Louisiana as a whole.

Predicted Golf Demand 2013				
5-mile Rings	# of Golfing Households	Golf Index	Predicted Rounds	Rounds Index
Dumas Golf Course	1,794	55	46,381	52
Webb Memorial Golf Course	7,000	58	157,271	43
City Park Golf Course	5,466	58	120,262	54
Santa Maria Golf Course	3,689	84	90,113	133
Howell Park Golf Course	5,523	55	130,043	40
J.S. Clark / 1st Tee	1,640	51	42,177	62
Beaver Creek Golf Course	627	82	16,255	233
E. Baton Rouge Parish	16,350	63	384,356	50
State of Louisiana	145,679	55	3,600,938	54
Source: National Golf Foundation				

Golf Course Supply Factors

There are a total of 13 golf facilities in the Parish of East Baton Rouge, comprising 207 holes of golf. The table below shows the total number of golf facilities and total golf holes within five miles of each BREC Golf facility site, with a comparison to the number of households within that same geography. The resulting ratio is a telling measure of the relative supply of golf in any geography. The Household/Supply Ratios are derived by dividing the number of households by the number of 18-hole equivalent golf courses. This measure is used as a benchmark to establish the level of support (households) that is available for each 18 holes of golf in the market. For reference, there are. The Household /Supply index is derived from these ratios and compared with the base national figure of 100 (8,160 households per 18-H in the total U.S.).

As the following table indicates, all but two of the BREC golf courses are located in sub-markets that have Household/Supply indices at or above 150, indicating there are 50% more households available to support each 18-hole golf course (favorable). The Dumas Golf market has a Household/Supply index below 150, and Beaver Creek's extremely small neighborhood creates a very low Household/Supply index of 25 (extremely unfavorable). Overall, the Parish golf market is not "oversupplied," but the households within this market are clearly not demanding a high quantity of golf rounds.

Golf Facility Supply 2013				
5-mile Rings	Total No. of Golf Facilities	Total No. of Golf Holes	Households per 18 holes	HH per 18 Hole Index (US=100)
Dumas Golf Course	3	45	8,657	106
Webb Memorial Golf Course	5	81	17,676	217
City Park Golf Course	5	81	13,906	170
Santa Maria Golf Course	2	36	14,551	150
Howell Park Golf Course	4	63	19,157	235
J.S. Clark / 1st Tee	2	27	14,141	173
Beaver Creek Golf Course	3	45	2,028	25
E. Baton Rouge Parish	13	207	15,050	184
State of Louisiana	154	2,340	13,545	166
Source: National Golf Foundation.				

Change in Golf Supply

East Baton Rouge Parish has seen a considerable reduction in the number of golf holes, with 72 holes (four 18-hole courses) closing since 2003. This figure represents about 26% of the inventory for golf holes in the Parish, compared to 8.8% for the State and 1.8% for the total U.S. The NGF tracking database indicates there are no golf facilities in planning or under construction in East Baton Rouge Parish.

Golf Course Construction Activity, 2001 - 2010			
	E. Baton Rouge Parish	State of Louisiana	U.S.
Total holes added past 10 years	-72	-225	-4,707
Percent Total Holes Added	-25.8%	-8.8%	-1.8%
Source: National Golf Foundation			

Golf Course Market Supply / Demand Summary

The collection of the previous data allows NGF to make comparison between supply and demand in the broader Baton Rouge MSA and each BREC Golf facility sub-market. As expected, the results are comparable to the population and income data within the small rings areas around each property showing very low demand and a relatively (compared to households) low supply of golf courses.

Market Status

Using the most basic measures of golf demand and supply, we note four possible combinations for any given geography: (1) favorable demand and favorable supply ("opportunity"); (2) favorable demand and unfavorable supply ("active"); (3) unfavorable demand and favorable supply ("inactive"); and (4) unfavorable demand and unfavorable supply ("saturated").

As shown in the table below, all BREC Golf sites are in markets with generally favorable supply conditions, but very low demand estimates. Many successful golf facilities in the U.S. tend to be located in "opportunity" markets, although this is not universal. The Baton Rouge MSA would be categorized as extremely "inactive," with very unfavorable demand and favorable supply.

Golf Market Demand 2013			
10-mile Rings	Demand Index	HH/Supply Index	Market Status
Dumas Golf Course	52	106	Inactive
Webb Memorial Golf Course	43	217	Inactive (extreme)
City Park Golf Course	54	170	Inactive
Santa Maria Golf Course	133	178	Opportunity (but small)
Howell Park Golf Course	40	235	Inactive (extreme)
J.S. Clark / 1st Tee	62	173	Inactive
Beaver Creek Golf Course	233	25	Active (very small)
East Baton Rouge Parish	50	184	Inactive
Source: National Golf Foundation. N/A = Data not available			

Golfers per 18 holes

NGF has also evaluated the relative strength of these markets with a comparison to a national “threshold” of golfers per golf course within 10 miles of a golf course. In its 2009 publication *“The Future of Public Golf in America,”* NGF hypothesized that the best predictor of a public golf course’s success was the number of golfers per 18 holes within a 10-mile radius, with 4,000 identified as the key number for projected financial stability. As shown in the table below, BREC Golf courses are all in sub-markets with fewer golfers per golf course than the identified threshold, with only Santa Maria operating in a sub-market that is close to the threshold. In fact, the overall Parish of East Baton Rouge market has only about 50% of the number of golfers per course compared to the identified threshold. Still, the Parish is more favorable than the State of Louisiana overall, which has fewer than 42% of the number of golfers per golf course compared to the identified threshold.

10-mile Rings	Est. No. of Golfers	Total 18-H Equivalent	Golfers per 18 holes
Dumas Golf Course	10,550	6.5	1,623
Webb Memorial Golf Course	20,834	10	2,083
City Park Golf Course	18,915	8	2,364
Santa Maria Golf Course	18,290	5	3,658
Howell Park Golf Course	20,362	7	2,909
J.S. Clark / 1st Tee	11,064	6.5	1,702
Beaver Creek Golf Course	3,040	99	337
Total U.S. “Threshold” for Successful Public Golf			4,000
Aggregate E. Baton Rouge Parish	23,437	11.5	2,038
Aggregate State of Louisiana	214,350	130	1,650
Source: National Golf Foundation			

EXTERNAL FACTORS SUMMARY

Some summary points about the overall market environment within which BREC Golf courses are operating include:

- National trends in the golf industry are not favorable for operators of golf courses. The total number of “core” golfers is declining and total spending on golf is declining along with them. Similarly, the total number of golf courses had expanded in previous decades, leading to a decline in per-course rounds and revenues collected. NGF has also documented rapid inflation in expenses to operate golf facilities nationwide.
- On the positive side, NGF has observed a growing trend of golf facility closures, the result of which would be a more favorable environment for surviving golf facilities. In addition, the longer term trend shows the generation of future seniors moving towards retirement with a higher level of disposable income than any previous generation. In addition to more traditional golf demand segments, the keys to growth in golf activity at BREC courses will be increasing participation among younger people (under age 35) and from minorities and females. Facilities that have broader appeal to multiple segments (including beginners) tend to perform better in this market.
- The greater Baton Rouge area has many attributes that tend to coincide with lower-than-average participation in golf. First, the incomes of residents in the Parish tend to be lower than is typical for golf participation, and there are large diverse populations in the Parish, many of which do not have a strong tradition in golf. Still, these factors are not universal in the Parish as a few of the BREC courses (Santa Maria and Beaver Creek in particular) are located in sub-markets with strong golf demand characteristics.
- Relative to its population, Baton Rouge has a smaller number of golf courses leading to a more favorable ratio of households to golf holes courses. The result is a highly “inactive” golf population with demand estimates tending to exceed actual participation on the ground. Thus it appears that more will need to be done to stimulate greater activity from the local population to demand more golf through organized activities, groups, schools, leagues, programs, etc.
- Visitors to Baton Rouge are expected to contribute a significant volume of golf activity. Visitation related to State government, LSU, large corporations and tourism could contribute significantly to golf demand at BREC courses. This segment represents a sizable market opportunity for golf activity for BREC Golf courses, and a market segment that should be actively targeted with a wide range of promotional activities.

Overview of East Baton Rouge Parish (BREC) Golf System

The BREC Golf system comprises seven golf facilities with a varying mix of facility types and associated amenities. The first Parish golf course was City Park in the 1920s. The Parish then added Webb Memorial (1930), followed by J.S. Clark (1951), Howell Park (1957) and Dumas (1960) in the 1950-1960 period. More modern courses were added at Santa Maria (1986) and Beaver Creek (2002). The 9-hole J.S. Clark course was modified into a full First Tee facility in the early 2000s.

As a whole, the golf system was able to generate approximately \$3.6 million in total on-site revenue in FY2013. With total basic operating expenses around \$4.09 million, the combined seven-facility golf system is operating with revenues that are not sufficient to cover the basic day-to-day expenses, before the addition of other Parish expenses such as overhead, internal fund charges, debt and depreciation. This basic financial condition is not uncommon in municipal golf across the U.S., although the majority of municipal golf course operations are able to cover on-site expenses, but not able to cover all direct on-site expenses AND large depreciation or debt service (only 20% can cover debt and depreciation). The facilities, golf course type, amenities, and year open are shown below:

Golf Facility	Type	Year Open	Amenities
Beaver Creek Golf Courses	18-Hole Regulation	2001	Clubhouse, grill area, lighted range
Dumas Golf Course	18-Hole Regulation	1960	New (2011) clubhouse, grill area, deck/overlook, adjacent theater
Webb Memorial Golf Course	18-Hole Regulation	1930	Small pro shop, snacks/vending, adjacent park/gymnasium center
Santa Maria Golf Course	18-Hole Regulation	1986	Large 2-story clubhouse, grill, overlook/deck, driving range
Howell Park Golf Course	18-Hole Regulation	1957	Small clubhouse building with check-in counter, small retail area and meeting room
J.S. Clark Par-3	9-Hole Executive	1951	Clubhouse with check-in counter, small retail/snack area and First Tee room, lighted driving range
City Park Golf Course	9-Hole Executive	1928	Small check-in area and pro shop, small adjacent cart storage

In our review of the BREC Golf system, the NGF Consulting team found varying quality golf facilities that are spread out evenly over East Baton Rouge Parish. Despite being very different in style and quality, NGF found a very similar operation at these facilities, thus not taking advantage of the variety of offerings to the golfing public. As such, the Parish may find it worthwhile to consider creating a plan to better segment the courses in the system, with lower fee facilities, middle fee facilities and higher fee facilities. Also, it appears that the golf courses in the BREC system have growing capital needs, and the Parish should begin planning for some important capital investments in these properties and the possible re-purposing of others that may not be sustainable even with new investment. In short, the Parish may find that BREC Golf courses need to be better promoted to take advantage of the multiple offerings, noting that the

system has a golf facility to serve every segment of existing golf demand, from a beginner 9-hole executive course and driving range at J.S. Clark, to a more intriguing 9-hole executive course at City Park, to middle-quality golf courses at Webb Memorial, Howell Park and Dumas, to the “destination” championship golf at Santa Maria and Beaver Creek.

As part of this consulting effort, NGF Consulting has observed very dedicated and hard-working staffs at all BREC Golf facilities. All of the facilities are presently operating under somewhat reduced staffing due to budgetary limitations, and are trying to get by with often very limited resources. BREC should prepare for physical improvements that will be needed at each of these golf courses to help improve financial performance and increase revenues.

ORGANIZATION AND ADMINISTRATION

The golf program for Baton Rouge is organized as a public accommodation with a central administration, and golf managers and lead superintendents at each individual facility. To oversee operations, the Golf system has a single Director of Operations and Two Assistant Directors – one for maintenance and one for operations. However, this was reduced in recent years to just one assistant director. The Golf Director of Operations reports directly to the BREC Assistant Superintendent. At the time of the NGF review, the Director of Operations was maintaining an office at Santa Maria GC (best performing facility), as opposed to the BREC central office.

The oversight of the system is through the BREC hierarchy. BREC is a taxpayer supported parks and recreation system, with a lower tax base and thus tighter budgets. The system has experienced a reduction in staff and this has affected golf operations. The golf system has a 10-member Golf Committee that meets once per month, and provides a step in the overall approval process for various golf items on the BREC Commission agenda.

Organizational Structure 2014

The key administrative and management positions for BREC Golf include:

BREC Golf System Key Management and Administrative Positions - 2014	
Golf Administration Positions (all FT)	Primary Responsibilities
Golf Director of Operations	Senior manager for overall golf program
Assistant Director of Operations	Assists with staff, marketing + admin.
Senior Course Manager	Oversee Golf programs
2 nd Assistant	Presently not staffed
Key On-Site Staff	Primary Responsibilities
Head Professional	Oversee golf operations
Superintendent	Oversee golf maintenance

Parish / BREC Support for Golf Operations

The Golf system is controlled by the BREC main department, creating a cumbersome system with many moving parts and a difficulty in rapid action to adjust to a changing environment. The recent recession has affected BREC’s ability to perform all functions, and the golf courses are affected as well. Given the golf system is not profitable, there has been reductions in spending for golf needs. Other system-wide issues observed by NGF that affect the golf system’s potential include:

- **Bureaucracy.** One key NGF observation is the golf system is run as a public accommodation, and not as a business enterprise. It did not appear to NGF as though there was one Golf manager that was in charge of all the operations affecting the golf courses, and other departments were involved, such as Capital Improvement, Finance & Purchasing and Human Resources. It appears to NGF that the system is functioning as a cost center, rather than a revenue center.
- **Taxpayer Support.** BREC has recently approved a 10-year tax appropriation that will provide a total of \$2.1 million for the golf course system, or roughly \$30,000 per course per year.
- **Urgent Needs.** It appears to NGF that BREC has been slow to react to urgent needs, some of which could affect revenue performance. Some examples reported to the NGF consulting team include various repairs and improvements that have been delayed or under-funded, such as pipe/leak repairs at Beaver Creek, the Pump at City Park and others.
- **Purchasing.** The purchasing system appeared cumbersome, even for relatively minor items. Some items are “mission critical” in golf operations that are needed on a daily basis and can’t wait several months for approval. BREC has taken steps to improve this with a new May 2014 initiative and the use of Purchase Cards.
- **Budget.** Golf managers cannot add personnel even though these additions may lead to increased revenue. Also, staff reports difficulty in making purchases for inventory that is to be re-sold (for profit) in pro shops and snack bars. While this is common in public accommodations, it is highly counter-productive in business and in an enterprise operation. We understand that this issue has been lessened with the hiring of a new Finance Director.
- **Human Resources.** Another area of concern is in human resources where the golf system struggles with replacing employees. The NGF did observe vacant positions and delays in replacement, in part due to managers not effectively planning for anticipated openings and not submitting appropriate requisition forms.

Accounting / Recording Keeping

One of the issues that hampered our investigation was the inability to get detailed reports from BREC. Some of this may have been due to the switch over in accounting systems, but the NGF encountered problems in obtaining appropriate and complete point-of-sale (POS) reports as requested. This was considered important because the NGF has documented that getting good reports is critical to effective management. Some of the problems NGF encountered included:

- **Inadequate Use of POS System.** From a golf management standpoint, the *Vermont System* POS is not ideal for use in municipal golf due to the lack of ease in use, although we recognize that BREC is a large division and the system is being used to provide consistency across all segments of BREC, not just the golf system. Although the current system allows for key features such as an integrated tee sheet and the ability for golfers to book tee times directly online through the website, the system is not being used this way (changes appear to be happening in late 2014). It appears that BREC is only using a fraction of the modules and features provided for by the software although some of this may be related to staff expertise and training (improvement has been observed in 2014).
- **Expertise:** In addition to the POS observations, it also appeared to NGF that there was limited efficiency in operating the POS system, as NGF requests for information proved difficult for staff to obtain. Improved training in the use of the selected POS system is recommended.

- **Management:** Several key reports were not readily available or easily generated, suggesting that managers were not using these reports, or they would have been available (the Golf manager during the NGF review is no longer with BREC).
- **Accuracy / Consistency:** The NGF team had difficulty matching up the POS reports with other reports from the BREC accounting system. We recognize that there are going to be adjustments made in the accounting system that will not be reflected in the POS reports, but some of the differences were significant. Another concern was duplicated line items (eg. “bldg. repair serv” and “bldg. repair service”), and many more that seemed out of place (eg. Fertilizer, pesticide, tractors and mowers appearing as pro shop expenses instead of course maintenance expenses.). In addition, there are some line items that appear in some years reviewed, and then do not appear in others (i.e. “annual leave”, “sick leave”, “paid time off”, “comp time,” and “indp contract skilled svcs” do not appear in 2012 and 2013 reports). It is not clear as to whether these were rolled up into full time wages or simply no longer being charged to the division.
- **Comprehensiveness:** The reports for BREC golf do not show the true costs for the golf division. This is because there was no accounting for the services performed by other departments in BREC for the golf division such as finance, human resources and employee benefits (most important). These are major expense items that should be reflected in the golf reports to give a truer measure of performance. While the financial reports we received (and are distributed to the golf committee) show raw payroll, they do not include such items as health insurance, retirement benefits, sick leave, annual leave, etc. We understand that this issue has been lessened with the hiring of a new Finance Director.
- **Facility Assignment:** Some sales data is being recorded at individual facilities that may not be the true source. For example, prior to 2013, all the pass sales were allocated to City Park and Beaver Creek instead of showing up at the facility where they were purchased. This had the effect of distorting the actual sales for all the facilities – to the benefit of Beaver Creek and City Park and the detriment to the rest. This was corrected in 2013.
- **Expense vs. Investment:** The accounting practice used in the BREC reports reflects a common practice among municipalities to treat all expenditures the same, whether they are operating expenses, capital improvements, capital equipment purchases, or inventory. In the business world, these are all treated differently. Purchases for inventory for sale (cost of sales) are not considered an expense but are a deduction from revenue. Capital expenses, whether improvements or equipment, are also considered separate because they are long term investments rather than a regular operation expense.

GOLF SYSTEM OPERATIONS

The basic structure of BREC Golf system is organized with formal management and oversight from the BREC Golf Director of Operations. Each golf course then has an on-site manager and superintendent, although some include shared positions. All golf course staff on site at each of the seven courses are direct BREC employees. This structure is still the most common form of operation for municipal golf courses in the United States.

Staffing

The basic staffing for BREC Golf facilities include the positions shown in the table below. Although there are some variations, this is the basic structure of “standard” positions for each

BREC golf facility. Full-time (FT) positions include positions with salary and benefits. Some part-time positions may involve more than 40 hours per week, and include limited benefits (deferred comp, paid time off and facility privileges). It is expected that Santa Maria and Beaver Creek would require the most pro shop and maintenance responsibilities, due to higher fees and higher customer expectations, as well as more large tournaments. The BREC system has a great advantage with a strong internal training system. Golf Pros and superintendents can start at 9-hole courses and work their way up to middle quality courses and higher-quality 18-hole courses, all within the BREC system.

Golf Maintenance Positions	Pro Shop / Operations Positions
Golf Superintendent (FT)	Golf Course Manager (FT)
Asst. Superintendent (FT)	Golf Activity Coordinator(FT or PT)
Irrigation Tech (FT or PT)	Golf Shop Clerk (PT)
Greenskeeper (FT or PT)	Golf Cart Attendant (PT)
Equipment Repairer (FT or PT)	Food and Beverage Mgr. / Assoc. (FT or PT)

Staffing Totals

The BREC golf system includes 151 total positions, with 133 filled and 18 vacant at the time of the NGF review. The reported active staffing at each BREC Golf facility is shown below:

BREC Golf System Total Facility Staffing – 2014								
Facility	Pro Shop		Maintenance		F & B		Total Facility	
	FT	PT	FT	PT	FT	PT	FT	PT
Santa Maria GC	3	10	9	2	2	3	14	15
Dumas GC	2	8	7	2	1	0	10	10
Webb Memorial GC	2	8	6	1	0	0	8	9
City Park GC	1	8	2	2	0	0	3	10
Howell Park GC	2	8	3	0	0	0	5	8
J.S. Clark / 1 st Tee	2	11	1	1	0	0	3	12
Beaver Creek GC	2	9	8	2	1	2	11	13
Total	14	62	36	10	4	5	54	77
Avg. per 18-H	2.3	10.3	6.0	1.7	.7	.8	9.0	12.8

The above staffing totals are compared to national “standards” of public golf operations nationwide in 2012:

U.S. Averages Distribution of Active Staffing – Full-Time Equivalents (Year-Round)						
		Total U.S.	Daily Fee Golf Courses by season length		Municipal Golf Courses by season length	
	BREC Course in 2014**	Avg.*	10-12 mos.*	<10 mos.*	10-12 mos.*	<10 mos.*
Golf Maintenance Staff	7.0	10.0	9.5	7.0	10.5	9.0
Pro Shop Staff	7.0	6.5	6.0	5.0	7.5	5.5
Clubhouse Staff (F&B)	Incl.	3.0	3.0	2.0	2.0	2.5
Total	14.0	19.5	18.5	14.0	20.0	17.0
Source: National Golf Foundation. *Includes average per 18 holes and is based on combination of PT and FT. **Includes only active staff at the 18-hole courses Santa Maria, Dumas, Howell Park, Webb Memorial, and Beaver Creek.						

Golf Course Operations

The NGF review has observed several key considerations related to the operation of the BREC system golf courses that generally tend to apply to all facilities. This includes review of management, budgets, operations, customer service, technology, and marketing.

Management/Budget

The general NGF observations regarding on-site management of BREC golf facilities include:

- There is a pervasive feeling among the staff that there is a lack of leadership in the BREC golf system, and BREC in general.
- The NGF believes that the overall morale among managers and staff may be low, in part due to recent performance and possibly leadership in the Golf System.
- Staff and mid-managers do not feel they have any input into processes and facility operations.
- Concern that golf professionals are not able to teach at BREC facilities. This makes the hiring of PGA professionals difficult, and affects operations.
- The budget process does not appear to be in sync, with all aspects of the golf system represented. The system is budgeting to revenues, not to the needs of the golf courses. Each facility is reporting a budget, which is very fixed and cannot be adjusted in mid-year. For example:
 - Staff cannot buy more merchandise, even if all inventories have sold and need to re-stock (changed with new golf oversight in 2014).
 - Manager cannot hire more staff, even if help is needed and can help lead to additional revenue (such as F&B).
- BREC courses are allowed to pay overtime, but the procedure required seems to discourage managers from requesting overtime when needed. This can cause problems in golf course maintenance where excess hours are required, which can affect golf course conditions and playability.

Customer Service

Observations related to customer service and the golfer experience observed by NGF includes:

- **Reputation** - There is a pervasive feeling among staff that the system suffers from a reputation for poor service. However, surveys conducted by NGF in 2014 suggest customer service is not that bad overall.
- **POS / Tee Sheets** - There are no integrated tee sheets or use of technology for tee times. All tee sheets are done by hand with manual entry. This takes time for staff and is unproductive time for a limited staff, but it also leads to poor customer service. There are frequent reports of interruptions with credit card systems, lasting for long periods (BREC has been working to repair in 2014).
- **Marshaling** - There are no restrictions on various golfers groupings, etc., and five-somes are reported to be common. NGF also observed very limited marshaling of the golf courses, leading to a slower pace-of-play and less overall on-course service.
- **Hours of Operation** - The hours of operation are based on staff and not demand. For example, the carts MUST be in by 7:45 so staff can go home at 8:00, even if there are golfers on the course who want to play longer.

- **Tournaments** - The system's tournament policy is very restrictive, and actually discourages the sale of potentially lucrative tournaments. Sponsors must meet a large insurance requirement that is not required at other golf courses (very uncommon in golf industry). Golf managers feel this and other policies (security, bartender, etc.) have cost tournaments and revenue (changed with new golf oversight in 2014).
- **Carts** – The system uses a system to rotate new carts into the fleet each year at each course. BREC is buying reconditioned (used) carts only. Moving carts from facility to facility has been an issue, is time consuming and expensive.

Lessons and Programs

NGF observed that the Golf Operations Director that was in place at the time of the NGF review placed a high degree of emphasis on new player development and golf lessons and programs:

- Major point of emphasis, especially for women, juniors and the golf academy
- Just started “Golf Workshop Program”
- Bringing more learning opportunities
- Only have one PGA Pro (at Clark) plus one contract PGA Pro at City Park (not counting Supervisor)
- Have parent/child tournaments and are planning on some parent/child clinics
- Have youth tournaments that are very popular in the summer

System-Wide Maintenance Issues

In general, the BREC golf system is varied enough that there is not a “one-size-fits-all” approach to golf course maintenance, which is appropriate. Among the key observations made by NGF regarding the maintenance practices at BREC courses:

- The courses are still over-seeding all greens in the winter, except Beaver Creek and Santa Maria.
- Most courses are not getting ANY fertilizer or chemicals applied. Supers are allowed to spend budget on chemicals & fertilizer (where it is in the budget), but not on personnel or equipment.
- There is sharing of equipment within the system. Beaver Creek and Santa Maria tend to get the new equipment, the others get hand-me-downs from these courses.
- There is also a sharing of key superintendent personnel. For example, the Superintendent at Beaver Creek also has responsibilities at JS Clark and Dumas, although he rarely visits either of these other courses.
- There is only one irrigation tech in the BREC system, located at Santa Maria. However, this position is tied to Santa Maria due to irrigation issues at that facility, leaving others courses under-served in this area.
- There are only two real mechanics in system (Santa Maria + Beaver Creek), plus one that does carts and low-level maintenance at Dumas.
- There are system-wide issues with maintenance equipment, the number of staff at each location and budget. This is an issue in the entire system, although Santa Maria is the closest to being appropriate.

- The NGF noted a very high equipment repair budget, showing the effect of an aging fleet. NGF was informed that the golf system does not have adequate capital equipment replacement plan.
- Have to move money to purchase chemicals and fertilizer for Dumas, Howell, Clark, Webb. CP from BC budget because they did not have any money in their budget to do so.

Fee Structure

The table that follows shows the fee structure at BREC Golf courses. For the most part, the current fees are consistent with the course conditions. NGF will provide specific recommendations regarding golf fees later in this report, and cover all issues related to each golf course, seniors, discounts, third-party wholesalers, residents, and multi-play programs.

Daily Green Fees

2014 Daily Green Fees							
	Santa Maria	Beaver Creek	Webb Memorial	Dumas	City Park	JS Clark	Howell
Weekday							
9 Hole	\$15.00	\$15.00	\$8.00	\$7.00	\$6.00	\$6.00	\$6.00
18 Hole	\$28.00	\$25.00	\$15.00	\$12.00	\$10.00	\$10.00	\$10.00
Senior	\$22.00	\$8.00	\$13.00	\$9.00	\$8.00	\$8.00	\$7.50
Junior	\$22.00	\$15.00	\$13.00	\$9.00	\$8.00	\$8.00	\$7.50
Twilight	\$22.00	\$15.00	\$13.00	\$9.00	\$8.00	\$8.00	\$7.50
Weekend							
9 Hole	\$18.00	\$18.00	\$10.00	\$8.00	\$7.00	\$12.00	\$7.00
18 Hole	\$38.00	\$38.00	\$18.00	\$14.00	\$12.00	\$10.00	\$12.00
Senior	\$30.00	\$30.00	\$16.00	\$12.00	\$10.00	\$10.00	\$10.00
Junior	\$30.00	\$30.00	\$16.00	\$12.00	\$10.00	\$10.00	\$10.00
Twilight	\$30.00	\$30.00	\$16.00	\$12.00	\$10.00	\$7.00	\$10.00
Cart Fees							
9 Hole	\$6.00	\$6.00	\$6.00	\$6.00	\$6.00	\$6.00	\$6.00
18 Hole	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00

Annual Pass Analysis

In addition to daily green fees, BREC also offers a pre-paid golf pass for golfers to purchase, with choices for all seven facilities (including Santa Maria and Beaver Creek), and a 7-day pass or for weekdays-only. The current fees and NGF analysis are shown below:

Annual Pass Analysis

There are opportunities for improvement with regards to the annual pass program as can be seen in the table below. Break even represents the number of rounds in a year that must be played under the pass to equal what the person would have paid without the pass. We calculated the break even by taking the pass fee and dividing it by the highest green fee at the highest priced course in the plan. For 7-day plans, we took the average of the weekend and weekday rate:

Annual Pass Analysis					
7 Course Plans	Current Fee	No. Sold	Break Even	No. Rounds	Rounds / Pass
Monday- Thursday					
Individual	\$1,450	30	51.79	87	2.90
Family	\$2,175	-	77.68		
Senior	\$1,000	38	45.45	161	4.24
Senior Couple	\$1,500	-	68.18		
7 Day					
Individual	\$1,700	1	51.52	1,551	1,551.00
Family	\$2,500	-	75.76		
Senior	\$1,350	103	51.92	6,020	58.45
Senior Couple	\$2,025	-	77.88		
Cart Plan	\$625				
5 Course Plans					
Monday- Thursday					
Individual	\$450	-	30.00	37	
Family	\$650		43.33		
Senior	\$350	4	26.92	2,205	551.25
Senior Couple	\$500		38.46		
7 Day					
Individual	\$550	14	33.33	2,494	178.14
Family	\$750		45.45		
Senior	\$450	74	31.03	10,464	141.41
Senior Couple	\$600	-	41.38		

Observations:

- The review suggests there may be an issue with the recording of pass rounds, relating back to record-keeping noted earlier (NGF does not actually believe a golfer played over 1,500 rounds in a year). While this is likely due to input issues,

it may also reflect some clerks giving non pass-holders a “free pass,” which is supported by the overall high number of rounds per pass.

- The senior 5-course plans appear to be too good of a bargain. They require by far the fewest number of rounds to achieve “break-even.” In other words, seniors are getting a better break on the annual passes than on the regular green fees.
- The seven course plans appear to be too expensive relative to green fees. Normally one would want a break-even around 40 to 45 rounds for a seven day pass and around 35 on a weekday pass. The seven course plans have significantly higher break-even points than the five course plans.

Golf System Marketing

Traditionally, NGF recommends marketing budgets for golf courses of at least 2% of total gross facility revenue, or roughly \$70,000 for BREC in 2013. Review of budgets shows that \$80,000 was budgeted for marketing in 2013, with all decisions on marketing made by the Golf Operations Supervisor. In review of the existing system, NGF found the following key strategies undertaken by BREC Golf in marketing and promoting the golf courses:

- Advertising on ESPN radio, billboards and golf TV.
- Are doing some ‘stay & play’ with area hotels.
- New course signage.

Website Review

It is clear that in 2013 and the foreseeable future, the Internet is the most significant piece of golf course marketing. NGF research shows upwards of 80% of all golfers get information on golf course from the internet, especially while travelling to a new market. As a result, the Internet is now the most important single element in a golf facility’s (or golf facility system’s) marketing. The Web has several key advantages over other forms of advertising:

- **Cost.** A Website is relatively inexpensive to set up and maintain.
- **Reach.** Almost every household that contains a golfer has access to the Internet.
- **Information.** The amount of information that can be put on the Web is virtually unlimited.

NGF has reviewed the BREC Golf website, which is linked via the parks page:

<http://www.brec.org/index.cfm/park/category/6>. At present there is no link to the golf.brec.org page, there is no direct link to the golf page nor is it clear how to get there. Each course then has its own web page. The information contained on this site included:

- Very limited information on the golf courses
- On-line tee times takes to a 3rd party
- The individual course pages are:
 - Not user-friendly and one must go to the bottom of the page to find golf rates.
 - Have tournament results at the top of page (should be separate page).
 - Includes course scorecards, maps and weather
 - Includes fees and specials (one page for annual passes)
 - Few pictures
 - Good that it has course news and tournament results, but hard to locate.

Food and Beverage Operations

Ideally, every golf facility (regardless of type) needs to have some type of food and beverage operation. Food and beverage operations at golf facilities tend to achieve two goals: (1) provide direct revenue; and (2) help increase the overall volume of rounds and other revenues at the facility. As noted in the “Standards and Norms” (**Appendix A**), a high volume of net revenue is not expected from food and beverage operations. The typical 18-hole public golf course will earn about \$6.10 per round in food and beverage, leading to an expected total gross revenue level of around \$200,000 (±) per year, less direct costs. This would be considered “typical” for a regulation 18-hole public golf course playing around 33,000 (±) rounds, unless there was additional space for large banquets, parties, meetings, luncheons, etc. Having appropriate space available to host large banquets, parties and golf events/tournaments will certainly add to the potential revenue at golf facilities, both directly (increased F & B sales) and indirectly (increase green and cart fees).

BREC Golf Facility F & B Structure

The food and beverage operation at BREC Golf courses is made up of three facilities with grill operations (Santa Maria, Dumas and Beaver Creek). The other facilities are simply offering counter snacks and vending items. The only facility in the system with any sort of real banquet capacity beyond 50 (+/-) persons is Santa Maria. This structure limits the opportunity for enhanced F & B revenue, but also limits the golf courses ability to sell larger golf events and tournaments. A summary of the food and beverage concessions at BREC Golf courses is shown below:

BREC Golf System Food and Beverage Concession Review					
Course	Basic Features	Est. 2013 Gross Revenue	Gross Rev./ Round	COS %	Change Recommended
Santa Maria	Champions Grill, banquets, on-course service	\$160,975	\$4.58	44.8%	Match amenities to a “sports pub” feel, with more TVs etc. Add more bev. cart service. Improve banquet promotions.
Dumas	Waterfront Café	\$36,532	\$2.26	87.4%	Expand menu to include more healthy items. Add a bev. cart more often.
Beaver Creek	Creek Café, on-course service	\$33,603	\$1.59	95.4%	Improve layout and keep the grill open 7-days per week. When golf is open, café should be open.
Webb Memorial	Snacks at counter, vending	\$27,005	\$0.86	60.0%	Add covering to open area outside. Consider converting adjacent fitness area into a banquet-ready space.
Howell Park	Snacks at counter, vending	\$7,411	\$0.87	96.1%	Expand selection of snack and vending.
J.S. Clark Park	Snacks at counter, vending	\$3,990	\$0.71	83.5%	Expand selection of snack and vending.
City Park	Snacks at counter, vending	\$7,669	\$0.52	99.0%	Expand selection of snack and vending. Consider conversion of cart storage area into a small snack bar.
Overall BREC System		\$277,185	\$2.09	61.5%	

Merchandise Operations

The BREC system has mostly small pro shops, doing a modest (or very low) level of sales with limited displays and display areas. Some of the pro shops within the BREC system golf courses are adequate, and are presently selling an appropriate volume of merchandise, while others are very slight in the inventory available and thus produce much lower sales. At present, BREC Golf Courses are offering a light selection of mostly soft goods and apparel, with some shoes and a few utility golf clubs. Other matters shared with NGF in relation to the merchandising operation include:

- Staff complained that inventory purchases were problematic due to budget policies, although BREC reports changes in this approach with a new golf management team in place in 2014.
- The Golf System wants to improve the system and individual facility logos, make them more attractive and adding it to various pieces and apparel.
- Golf balls are the best-selling item, as is appropriate at public golf courses.
- The clientele at BREC golf courses are not big spenders when it comes to merchandise.

The national “standard” for pro shop revenue is \$2.32 for “mid-fee” public courses (see **Appendix A**), an amount that is exceeded only at the two premium BREC courses (Santa Maria and Beaver Creek). However, the direct cost of merchandise sold is much higher than the industry standard of under 70%, with all courses at or exceeding the standard in FY2013. A summary of BREC pro shop operations for 2013 is shown below:

BREC Golf System Merchandise Sales Review					
Course	Basic Features	Est. 2013 Gross Revenue	Gross Rev./ Round	COS %	Change Recommended
Santa Maria	Large and well stocked, full-service pro shop	\$152,981	\$4.35	83.0%	No change
Dumas	Light selection of goods, mostly counter sales items	\$15,470	\$0.96	71.8%	Add more floor displays and improve inventory, especially low cost apparel.
Beaver Creek	Attractive, but small shop with limited inventory	\$49,872	\$2.36	75.1%	No change
Webb Memorial	Limited shop that performs well considering small size.	\$37,185	\$1.19	83.5%	Expand the selection of goods and improve floor displays.
Howell Park	Very sparse inventory.	\$4,026	\$0.47	89.3%	Add floor displays and improve inventory, especially low cost apparel.
J.S. Clark Park	Light selection of goods, mostly counter sales items	\$6,727	\$1.20	69.3%	Expand the selection of goods, especially related to juniors, both equipment and apparel.
City Park	Very sparse inventory.	\$9,836	\$0.66	83.7%	Expand selection of goods for sale, especially low cost apparel.
Overall BREC System		\$276,097	\$2.08	80.8%	

Driving Range Operations

The table below shows that the driving range business represents a minor part of BREC Golf facilities' revenue, with only three facilities offering a driving range and none of these facilities generating a large volume of business. A realistic target for range revenues at facilities with driving ranges of this type is roughly \$2.00 per round of golf. The NGF recommendations related to BREC Golf range operations center around ways to increase activity and revenue within this system, and possibly adding a new range at Dumas GC.

BREC Golf Driving Range Operations Review					
Course	# Hitting Stations*	Notes	2013 Range Revenue	Range Revenue per Round	Change Recommended
Santa Maria	25	Small, grass only range	\$77,927	\$2.22	No changes
Beaver Creek	35	Full grass range of adequate size with lights for night use	\$34,153	\$1.61	Improve automated range ball dispensing
J.S. Clark	20	Small lighted range	\$14,632	\$2.60	Improve automated range ball dispensing
Dumas	No Driving Range				Consider adding new range
Webb Memorial	No formal range. There is a large open space golfers' use on their own for practice.				Consider adding new netted 'mini' range
City Park	No Driving Range				
Howell Park	No Driving Range				
Total System			\$126,712	\$0.95	
* NGF estimate					

BREC GOLF GOLFER SURVEY

NGF's Golfer Survey Program was distributed in May and June of 2014 seeking opinions for each course in the BREC Golf system. The survey was web-based and emailed out to golfers in the BREC Golf email database. A total of **294 surveys** were collected by NGF, with Santa Maria getting the most responses (65) and Clark the fewest (3). Because Howell (10 responses) and Clark received so few responses, no further analysis was done as it would not be statistically reliable. 239 (81.6%) of the respondents described themselves as daily fee players, with the remaining 18.4% being "annual pass holders."

The survey is not intended to be a scientific study of Baton Rouge area golfers, although the higher the participation, the greater the degree of confidence. One of the most important elements to this survey, though, is that except for the custom questions, the same survey is used by hundreds of courses across the country. This allows us to compare results from the BREC courses with other similarly priced courses.

It is also important to remember that the survey is from golfers *that currently play the BREC courses*. So these are the golfers who are *happiest* with the courses and their ratings are generally going to be more favorable than golfers who may have played the courses in the past but stopped playing. This is why the comparison to the national database is important as these

are also from current customers. A copy of the survey instrument is displayed in **Appendix C** to this report, with general findings shown below:

BREC Satisfaction Scores

BREC Golf Courses Satisfaction Measures					
	Beaver Creek	City Park	Dumas	Santa Maria	Webb
No. of Responses	76	45	35	68	57
Satisfaction Measures					
Overall Customer Satisfaction					
Score (scale 1-10)	8.1	7.1	6.2	7.7	6.4
Price Percentile*	63	17	5	29	5
Overall Percentile	55	9	2	24	2
Satisfaction Compared to Expectations					
Score (scale 1-10)	7.9	7.7	6.1	6.8	6.5
Price Percentile*	71	36	5	8	10
Overall Percentile	62	39	2	8	5
Satisfaction Compared to Other Courses					
Score (scale 1-10)	8.0	7.4	6.3	7.1	6.1
Price Percentile*	73	40	12	26	10
Overall Percentile	69	36	8	25	6
Likelihood to Play More					
Score (scale 1-10)	6.1	6.4	5.4	6.3	6.0
Price Percentile*	19	24	2	31	5
Overall Percentile	20	36	3	29	10
Likelihood to Recommend					
Score (scale 1-10)	8.3	7.2	5.8	7.6	6.2
Price Percentile*	76	21	5	29	7
Overall Percentile	68	16	2	27	3
* Measured on a scale of 0 to 100, this number represents the percent of golf facilities that received lower customer ratings on this measure than the subject facility compared to other similarly-priced golf courses in U.S.					

BREC Golf Courses Satisfaction Factors					
	Beaver Creek	City Park	Dumas	Santa Maria	Webb
Overall Experience					
Score	8.3	7.4	6.8	7.6	7.1
Price Percentile	67	10	1	17	2
Overall Percentile	57	7	1	15	2
Affordability					
Score	8.1	8.9	8.0	6.7	7.3
Price Percentile	78	85	24	10	3
Overall Percentile	75	96	71	22	43
Overall Value					
Score	8.0	8.2	6.7	7.1	6.8
Price Percentile	65	50	0	8	0
Overall Percentile	62	72	6	12	8
Pace of Play					
Score	8.1	7.5	7.4	6.7	6.3
Price Percentile	96	59	51	23	6
Overall Percentile	90	62	54	16	6
Friendliness/helpfulness of staff					
Score	8.2	8.3	8.1	7.1	7.8
Price Percentile	28	32	22	0	8
Overall Percentile	24	38	21	0	8
Golf Course design/layout					
Score	8.8	8.0	7.2	8.9	7.8
Price Percentile	84	49	3	87	32
Overall Percentile	72	25	1	74	14
* Measured on a scale of 0 to 100, this number represents the percent of golf facilities that received lower customer ratings on this measure than the subject facility compared to other similarly-priced golf courses in U.S.					

Summary of Findings

1. The relatively low number of responses we believe are the result of a small email database used by BREC and is not indicative of the passion of the local players for the golf courses.
2. For overall experience, *only Beaver Creek scored better than the nation average* (67th percentile). On the other end, Dumas and Webb were in the bottom 2% nationally, City Park and Santa Maria were both in the bottom 20%. The average rating for the five courses was just 19.4 percentile.
3. When looking at the factors making up satisfaction, the one getting the highest ratings across the courses was “Golf Course Design/layout”, with an average percentile rank of 51.1 – or right at the national average. Santa Maria (87) and Beaver Creek (84) rated high in this category, while Dumas, at the third percentile, was by far the lowest.

4. Food and Beverage Service ranked the lowest overall, with an *average* percentile rank across the facilities of just the 5th percentile, or the bottom five percent nationally. Dumas, at the 19th percentile, was the only one to rate *higher* than the bottom 5%.
5. Also faring lowest across the board was “Condition of Greens”, with an average percentile rank of 10. Santa Maria (28th percentile) was the only one above the 15% percentile. Beaver Creek was next at 11th percentile and the other three all below the 5th percentile.
6. “Overall Course Conditions” had an average percentile ranking of 18;9. Only Beaver Creek (60th percentile) was considered above average. Santa Maria (27th) was the next highest, with the other three all in the bottom 5th percentile.
7. Another major area of concern is the fact that “Friendliness/helpfulness of staff” also drew low ratings, with an average percentile rank of 18. Santa Maria scored “0” meaning it had one of the lowest ratings in the country. Webb, at 8th percentile, was not far behind. City Park had the best score, but was still only in the 32nd percentile (bottom third of the country).
8. Competition: The survey indicated that for all the courses except Beaver Creek, the biggest competitor for each course was another BREC course. For Beaver Creek, it was Copper Mill, followed very closely by Santa Maria. Webb was the course most often mentioned as “another course they play” (by 49% of the respondents), followed closely by Beaver Creek (46%), and Santa Maria (45%). Copper Mill, mentioned by 40% of the golfers, was the highest mentioned among the non-BREC courses. It was followed closely by LSU at 37%. Clark (11%) and Howell (15%) were the two BREC courses mentioned the fewest times.
9. The profile of the BREC golfer is predominantly male (93.9%) and generally older (70.3% over age 50) than the national benchmark (total U.S. is 85% male and 50% over 50). More than 74.4% of respondents indicated they played fewer than 25 rounds of golf at the subject course annually.
10. There was no significant difference in satisfaction ratings between the annual pass holders and the daily fee golfers.
11. 73.7% of the golfers say they currently do not book tee times online, but 80.5% said they would use it if offered, at least on an occasional basis.
12. Most (63%) of the golfers said they would be willing to pay more if the course was in better condition. Over half of these were willing to pay at least \$3 more. Dumas, at 75%, had the highest positive rating, followed by Santa Maria (64%) and Beaver Creek (57%).
13. While pace-of-play was indicated to NGF consultants while we were on site to be a challenge, the survey results show much less concern among golfers. Beaver Creek, in fact, scored at the 96th percentile for satisfaction with pace of play. However, a slower pace is indicated at Santa Maria (23rd percentile) and especially Webb (6th percentile). It should be noted that having a great pace of play is not necessarily a good thing. It can simply be an indicator of not having many players.

14. In review of the general open-ended comments survey respondents made about **what they like about the subject course**, the answer varied with facility.

- Beaver Creek: Design/layout was the most mentioned (40%)
- City Park: Site/aesthetics was the most mentioned (32.7%), followed by design (19.5%). Also mentioned were its historic nature (6%).
- Dumas had design (37.7%) and site (12.2%) as most mentioned.
- Santa Maria had design mentioned most (43.6%).
- Webb had design mentioned the most (23.4%), followed by price (17.8%), and staff (13.1%).

15. In review of the general open-ended comments survey respondents made about **what needed improvement at the course**, the NGF noted many more comments with a variety of topics, the most common included:

- Improving course conditions was the most mentioned for each course. Beaver Creek, with 27% of the comments, had the fewest percentage wise, followed by Santa Maria (34%), City Park (50.7%), Dumas (62.1%) and Webb (65.1%).
- Beaver Creek: After course conditions, the most mentioned were food & beverage (14.7%), design elements (9.8), and price and operations (both at 7.8%).
- City Park: Design elements was 2nd most mentioned at 18.3%, followed by Operations (10%).
- Dumas: Design elements (primarily drainage) was 2nd at 20.7%, followed by Operations (6.9%).
- Santa Maria: Operations was 2nd most at 13.4%, followed by price (12.6%) and food & beverage (7.2%).

SYSTEM-WIDE OPERATIONAL PERFORMANCE

NGF has completed a full review of the performance of BREC Golf courses. This review is summarized in the paragraphs that follow and expanded upon in review of the golf industry “Standards and Norms” Appendix presented later in this report. In summary, it appears that BREC Golf courses are performing with activity, revenue, and expenses that are well below expectations when compared to other municipal golf systems across the nation, considering that BREC Golf is operating in a mostly year-round climate with at least 10 months of reasonable activity each year. The review below covers rounds activity, revenues and expenses over the last few years.

Rounds

The table below shows total rounds by facility since 2011. We note that over this timeframe, BREC Golf experienced relatively consistent rounds activity as a system, but individual facilities have shown changes. The flagship courses Santa Maria and Beaver Creek increased play by 13% and 28% respectively, while Howell Park and City Park have shown declines. In comparison, the total U.S. golf industry has experienced a 9.7% decline in municipal golf course rounds between 2005 and 2010, with a 3% decline from 2010 to 2012. Total average rounds (“starts”) per 18 holes now stands at 31,527 for municipal golf courses, showing that only Webb Memorial and Santa Maria are exceeding this figure.

BREC Golf System Total Rounds Played by Facility (2011 – 2014*)							
Year	2011	2012	2013	2014*	Total	2011- 2013 Avg.	% of Total
Santa Maria	31,084	31,917	35,133	6,602	104,736	32,711	24.9%
Dumas	15,104	15,114	16,158	3,050	49,426	15,459	11.8%
Webb Memorial	30,861	31,322	31,267	6,367	99,817	31,150	23.8%
City Park	17,658	16,335	14,875	3,255	52,123	16,289	12.4%
Howell Park	12,028	10,171	8,550	2,072	32,821	10,250	7.8%
J.S. Clark	7,551	6,772	5,627	1,028	20,978	6,650	5.0%
Beaver Creek	16,546	18,419	21,157	3,883	60,005	18,707	14.3%
Total	130,832	130,050	132,767	26,257	419,906	104,977	100.0%
% Change		-0.6%	2.1%				
Source: BREC Golf Courses *Partial year through April 30, 2014							

Revenue and Expense by Facility

The table below shows total gross revenue by facility since 2011. We note that the total for 2013 is the highest in any of the years shown, showing a recent peak of performance. In comparison, we see that BREC Golf facilities are operating with revenues that tend to be well below the average for ‘standard’ courses (under \$40 green fee), as only Santa Maria is exceeding this figure. The NGF notes that in 2013, Santa Maria accounted for 45% of the total revenue in the seven-facility system. The U.S. average revenue for standard public golf courses was \$1,047,000 in 2012.

Revenues by Facility

BREC Golf System Total Revenue by Facility (2011 – 2014*)							
Year	2011	2012	2013	2014*	total	2011-2013 Avg.	% of Total
Santa Maria	\$1,303,579	\$1,327,366	\$1,612,589	\$520,111	\$4,763,645	\$1,414,511	40.5%
Dumas	\$272,560	\$285,506	\$322,973	\$119,117	\$1,000,156	\$293,680	8.5%
Webb Memorial	\$552,368	\$543,260	\$591,657	\$184,316	\$1,871,601	\$562,428	15.9%
City Park	\$324,647	\$296,844	\$174,135	\$73,928	\$869,554	\$265,209	7.4%
Howell Park	\$166,390	\$150,917	\$125,694	\$46,415	\$489,416	\$147,667	4.2%
J.S. Clark	\$120,216	\$95,715	\$109,185	\$36,379	\$361,495	\$108,372	3.1%
Beaver Creek	\$765,563	\$743,888	\$642,536	\$259,501	\$2,411,488	\$717,329	20.5%
Total	\$3,505,323	\$3,443,496	\$3,578,769	\$1,239,767	\$11,767,355	\$3,509,196	100.0%
% Change		-1.8%	3.9%				
Source: BREC Golf Courses *Partial year through April 30, 2014							

Average Revenue Analysis

The total system-wide average revenue earned per round of golf was \$26.96 in 2013. The average for standard public golf courses in the U.S. was \$23.51 for total golf revenue per round (green, cart, membership and range), plus an additional \$9.70 in ancillary spending for a total of \$33.21 per round. In general, BREC is playing a lower volume of rounds, and is also earning fewer dollars per round that is played, as compared to the total U.S. standard (**Appendix A**).

Expense by Facility

The table below shows total operating expenses by facility (including administration) since 2011. Total expenses for the BREC golf system have declined 5% since 2011, falling 12.9% from 2011 to 2012, and then increasing 8.6% from 2012 to 2013. The overall expenses to operate BREC Golf facilities are generally lower than expense averages for standard public golf courses in the nation (average facility = \$997,200 in expenses).

BREC Golf System Total Expense by Facility (2011 – 2014*)							
Year	2011	2012	2013	2014*	total	2011-2013 Avg.	% of Total
Santa Maria	\$1,101,409	\$990,951	\$1,064,743	\$274,901	\$3,432,004	\$1,052,368	25.8%
Dumas	\$554,918	\$528,853	\$573,156	\$152,396	\$1,809,323	\$552,309	13.6%
Webb Memorial	\$566,704	\$482,798	\$617,095	\$174,090	\$1,840,687	\$555,532	13.8%
City Park	\$274,217	\$239,548	\$213,568	\$57,583	\$784,916	\$242,444	5.9%
Howell Park	\$361,245	\$298,257	\$311,405	\$81,797	\$1,052,704	\$323,636	7.9%
J.S. Clark	\$339,441	\$278,848	\$315,411	\$101,886	\$1,035,586	\$311,233	7.8%
Beaver Creek	\$773,050	\$611,294	\$686,276	\$172,493	\$2,243,113	\$690,207	16.9%
Admin	\$350,656	\$334,649	\$305,848	\$111,130	\$1,102,283	\$330,384	8.3%
Total	\$4,321,640	\$3,765,198	\$4,087,502	\$1,126,276	\$13,300,616	\$4,058,113	100.0%
% Change		-12.9%	8.6%				
Source: BREC Golf Courses *Partial year through April 30, 2014							

System Summary

A summary of performance of BREC Golf Division is presented in aggregate and by facility.

BREC Golf System Summary of Performance (2011 – 2013)					
Description	2011	2012	2013	2014*	2011-2013 Average
Rounds	130,832	130,050	132,767	26,257	131,216
Revenue					
Green Fees	\$1,387,527	\$1,490,281	\$1,469,563	\$512,845	\$1,449,124
Cart Fees	903,753	835,573	837,568	297,844	\$858,965
Pass Fees	249,177	237,838	233,015	87,399	\$240,010
Driving Range	92,255	91,252	126,712	54,331	\$103,406
Food & Beverage	362,170	259,456	277,185	95,403	\$299,604
Total Tournament	166,229	224,956	295,458	96,776	\$228,881
Merchandise Sales	299,560	290,402	276,097	80,595	\$288,686
Other	44,652	13,738	63,171	14,574	\$40,520
Total Revenue	\$3,505,323	\$3,443,496	\$3,578,769	\$1,239,767	\$2,941,839
Cost of Sales					
Food & Beverage	\$149,658	\$144,989	\$170,333	\$46,752	\$154,993
Merchandise Sales	\$258,009	\$238,218	\$223,102	\$36,574	\$239,776
Total COS	\$407,667	\$383,207	\$393,435	\$83,326	\$394,770
System Gross Margin	\$3,097,656	\$3,060,289	\$3,185,334	\$1,156,441	\$2,547,069
Expense					
Course Maintenance	\$2,018,336	\$1,849,824	\$1,934,601	\$528,729	\$1,934,254
Proshop	1,716,385	1,367,091	1,623,444	409,299	\$1,568,973
Grill	114,177	107,702	109,794	37,650	\$110,558
Developmental (JS Clark)	122,086	105,932	113,815	39,468	\$113,944
System Administration	350,656	334,649	305,848	111,130	\$330,384
Total Expenditures	\$4,321,640	\$3,765,198	\$4,087,502	\$1,126,276	\$4,058,113
Net Operating Income	(\$1,223,984)	(\$704,909)	(\$902,168)	\$30,165	(\$1,511,044)
Source: BREC Golf Courses					

BREC Golf System Summary of per Facility Performance (2011 – 2014*)				
Santa Maria	2011	2012	2013	2014*
Total Facility Revenue	\$1,303,579	\$1,327,366	\$1,612,589	\$520,111
Cost of Sales	\$213,939	\$210,920	\$199,097	\$36,369
Facility Operating Expense	\$1,101,409	\$990,951	\$1,064,743	\$274,901
Santa Maria Net Income	(\$11,769)	\$125,495	\$348,749	\$208,841
Dumas				
Total Facility Revenue	\$272,560	\$285,506	\$322,973	\$119,117
Cost of Sales	\$36,361	\$43,357	\$43,054	\$12,688
Facility Operating Expense	\$554,918	\$528,853	\$573,156	\$152,396
Dumas Net Income	(\$318,719)	(\$286,704)	(\$293,237)	(\$45,967)
Webb Memorial				
Total Facility Revenue	\$552,368	\$543,260	\$591,657	\$184,316
Cost of Sales	\$48,522	\$42,338	\$47,238	\$3,674
Facility Operating Expense	\$566,704	\$482,798	\$617,095	\$174,090
Webb Memorial Net Income	(\$62,858)	\$18,124	(\$72,676)	\$6,552
City Park				
Total Facility Revenue	\$324,647	\$296,844	\$174,135	\$73,928
Cost of Sales	\$14,515	\$16,901	\$15,825	\$4,808
Facility Operating Expense	\$274,217	\$239,548	\$213,568	\$57,583
City Park Net Income	\$35,915	\$40,395	(\$55,258)	\$11,537
Howell Park				
Total Facility Revenue	\$166,390	\$150,917	\$125,694	\$46,415
Cost of Sales	\$12,430	\$11,495	\$10,717	\$3,674
Facility Operating Expense	\$361,245	\$298,257	\$311,405	\$81,797
Howell Park Net Income	(\$207,285)	(\$158,835)	(\$196,428)	(\$39,056)
J.S. Clark Park				
Total Facility Revenue	\$120,216	\$95,715	\$109,185	\$36,379
Cost of Sales	\$17,762	\$14,653	\$7,995	\$2,744
Facility Operating Expense	\$339,441	\$278,848	\$315,411	\$101,886
J.S. Clark Park Net Income	(\$236,987)	(\$197,786)	(\$214,221)	(\$68,251)
Beaver Creek				
Total Facility Revenue	\$765,563	\$743,888	\$642,536	\$259,501
Cost of Sales	\$64,138	\$43,543	\$69,509	\$19,369
Facility Operating Expense	\$773,050	\$611,294	\$686,276	\$172,493
Beaver Creek Net Income	(\$71,625)	\$89,051	(\$113,249)	\$67,639
Administration				
Total Admin Revenue	\$0	\$0	\$0	\$0
Admin Operating Expense	\$350,656	\$334,649	\$305,848	\$111,130
Net Administration	(\$350,656)	(\$334,649)	(\$305,848)	(\$111,130)
Summary BREC Golf System				
Total System Revenue	\$3,505,323	\$3,443,496	\$3,578,769	\$1,239,767
System-Wide COS	\$407,667	\$383,207	\$393,435	\$83,326
System Operating Expense	\$4,321,640	\$3,765,198	\$4,087,502	\$1,126,276
BREC Golf Net Income	(\$1,223,984)	(\$704,909)	(\$902,168)	\$30,165
Source: BREC Golf Courses *Partial year through April 2014.				

System Summary Discussion

A summary of NGF findings related to the revenue, direct cost of sales and expenses of the BREC golf system follows below.

Overall Performance

The financial reports we were given show the golf division being subsidized up to \$1.224 million in 2011, then improving significantly to a \$705,000 loss in 2012 before regressing to \$900,000 in 2013. However, the numbers in 2011 (and 2010) included about \$230k/year in employee benefits (annual leave, sick leave, etc.) that may not have been included in the 2012 and 2013. When this difference is accounted for, the amount of improvement is much less. Performance improved about 10% from 2010 to 2011, and then by almost 30% from 2011 to 2012, before falling by 1% last year. However, in 2013, there was around \$205,000 in capital equipment purchases compared to \$20,000 in 2012. When the capital equipment purchases are taken out, 2013's performance is only 2.7% worse than in 2012.

Revenue

Total revenue was \$3.5 million in 2011, falling 1.8% in 2012 to \$3.44 million, before rebounding by 3.9% in 2013 to \$3.578 million. Some NGF observations on BREC revenue:

- Green fees (including tournaments) accounted for nearly half the revenue in 2013, totaling \$1.765 million or 49.3% of total revenue. Green Fee revenue has actually gone up \$211,000 or 13.6% from 2011 to 2013. However, cart fees have gone down by \$66,000 over the same time.
- Pass sales have been relatively stable over the past four years, with \$233,000 in passes sold in 2013.
- Driving range revenue jumped dramatically last year, going from \$91,252 in 2012 to \$126,711, an increase of 39%. Range revenue has increased by 64.5% since 2010. This is excellent news as the driving range tends to be the most profitable area as operating expenses are relatively low.
- Food and beverage sales, despite the addition of alcohol in 2013, have actually declined by \$85,000 (23.5%) since 2011. Merchandise sales have also dropped since 2011, by 7.8% or \$23,000. However, unlike food and beverage which went up slightly last year, merchandise sales did not recover in 2013.

Cost of Sales

What is important with cost of sales (the cost of the inventory being sold) is not the total amount, but the ratio of the cost of sales to the revenue. The industry standards for cost of sales for a golf course food and beverage (grill) operation should be between 35 to 40%. As the cost of sales for alcohol should be 20% or less, the more alcohol sales, the lower the overall COS.

As a system, BREC golf averaged a 70% cost of sales for food & beverage, which is high for public golf operations. While it is true that the COS percentage for food/beverage items tends to be higher at the facilities lacking formal grill operations, it was actually higher at two of the facilities with grills (Dumas and Beaver Creek) and still high at Santa Maria. What is also distressing is that the number is increasing. In 2011 it was 47% before jumping to 71% in 2012.

Cost of sales for merchandise should be 70-75% of revenue. Again, we find the COS unacceptably high at 94% of the merchandise sold. In 2012 it was 78%, which is closer to where it should be. Making things worse, the cost of sales figures above may not include freight. We find a separate line item for freight, although it is not clear if this includes inventory sales or not. Normally, COS does include freight charges related to the inventory purchase.

Expenses

Operating expenses have actually declined by \$234,000 (5.4%) since 2011, although there was an increase from 2012 to 2013. A significant portion of the expense decline has come in golf course maintenance expenses, which is not viewed as positive as the expense reduction is reflected in the course conditions and course conditions directly affect revenue.

We note that for most of the facilities in the system, raw wages makes up a very high percentage of the course maintenance expenses. For public courses, the typical percentage is 50-55% of course maintenance expenses is in raw payroll (wages only, no benefits). Yet for many of the facilities at BREC, the percentage is 70% or more. This indicates that BREC is: (1) spending a lot more for payroll than is typical; and (2) is spending a lot less on non-payroll (i.e. pesticides, applications, treatments, etc.) items of importance to golf course maintenance. There are two possible explanations for this, both of which are typical in municipal situations.

- **Efficiency:** It is possible that the overall work efficiency is lower than seen in the private sector.
- **Pay Scale:** One advantage of working in a municipal system is that you can expect regular pay raises regardless of position or efficiency. So if a course's crew is dominated by long-term employees, these employees are likely making significantly more than comparable employees in the private sector. This does appear to be the case in several instances we examined.

Another area of higher than normal expenses comes from equipment repairs. This likely reflects the aging equipment being used. On the other hand, the amount spent on fertilizer and chemicals is less than we typically find at an 18-hole public course. The lack of spending typically is reflected in poorer course conditions, which we found.

Individual Facilities

ANALYSIS OF SANTA MARIA GOLF COURSE

Santa Maria represents the Parish's "Point of Pride" golf facility. The course was originally built in 1984-86 as a centerpiece amenity to a newer residential development of some 200 +/- single-family homes. The facility was acquired by the Parish in 1992 and converted to a full municipal golf course. This property represents a fully modern golf facility with extensive clubhouse and high quality driving range. As noted, almost 46% of all BREC system revenues are derived from Santa Maria GC, and the course compares favorably to the industry standards in most all measures of its operation.

Location, Access and Neighborhood

Santa Maria GC is located at the southern edge of East Baton Rouge Parish, just east of Interstate-10 and west of U.S. Highway 61. The course is located less than two miles from the interchange with I-10 at Highland Rd. Although the facility is proximate and convenient to the Interstate, the course and entrance are not easily visible from the major roadways and adequate signage is needed to find the course.

Local Santa Maria Neighborhood

Santa Maria is surrounded primarily by residential elements, with some appropriate commercial elements common in "bedroom" communities. Other key area findings with implications for golf course demand include:

- The local market has a large and growing population base, with previous (2000-2013) growth rates trending at five to six times national average in increases in number of households.
- There are 29,000+ households containing 80,400+ persons within five miles of the Santa Maria GC. The median household income of these households is \$85,200 in 2013, 80% higher than the overall Parish median of \$47,317.
- Within five miles of Santa Maria GC, the demographics are highly correlated with high golf activity:
 - 40.4% of households have annual incomes over \$100,000
 - Household golf participation rate is 12.7%, compared to 9.4% for the Parish and 8.3% for Louisiana (total U.S. = 15%).
 - Estimated rounds of golf per household is 33% higher than the total U.S. average.

Summary of NGF Findings on Santa Maria GC

Santa Maria GC represents a challenging, yet enjoyable golf course that is both aesthetically appealing and playable for all skill levels of golfers. The golf course appears to be very popular with golfers in BREC Golf market, and could be a must-play regional draw for customers seeking a destination for golf. The recommendations we have set forth follows this approach and planning. A summary of Key NGF findings on Santa Maria include:

Golf Course

- Regulation par-72 golf course layout with four sets of tees, numerous hazards and many design features commonly associated with high quality golf. Course may be too long for women and beginning golfers.
- Close is close to the railroad tracks. There is a full-length, full-service practice range and adequate on-course shelters and restrooms.
- Wall-to-wall cart paths. There are several roadway crossings that appeared well marked. One crossing has large bump that could be smoothed out. There is no sign directing golfers from the clubhouse to the first tee.
- High quality greens with 'Mini-Verde' grass that was added in 2005 renovation.
- Still has original (1985) irrigation system, with some new heads and new controllers added around the greens in the 2005 renovation. There is an unlimited water supply from Bayou. The system is reported to have frequent leaks in the original pipes requiring nearly one full-time maintenance worker to keep up with leaks.
- The course needs some drainage work. Getting a lot of run off from adjacent development. When there is heavy rain the course remains wet and thus cart-path only for four to five days.

Clubhouse and Other Amenities

- The overall presentation is not ideal, with entrance from the back needing to go upstairs for pro shop, then back downstairs for golf. Signage for new players to hole #1 and to pro shop is needed.
- Large clubhouse on two stories, with appealing snack bar/grill area and adequate space for 150+ person banquets and events. Includes a large kitchen with good capacities, plus two bar stations on the second floor.
- There are several nice overlook locations in the clubhouse and on balconies. Makes for nice views onto the golf course.
- Lower level includes a full indoor golf academy. The System Manager developed the academy and spent considerable time. Carts are stored underneath clubhouse.
- There is also a halfway house near the 1st and 10th tees, the 9th green and the driving range. This facility was not in use during NGF's visit. There is also a beverage cart for on-course services, but rarely used (mostly just tournaments).
- Clubhouse in generally good condition, but shows some age in places with carpets, walls and doorways (noisy).

Operations

- Staff is not adequate to cover all operations – 1 FT Manager + part-time in operations. As a result, the System Manager spent considerable time at this facility.
- There are technology concerns among staff. Only two phone lines – reported to be ringing constantly. Implementing a computerized/automated answering system with routing and voicemails would help. Also, on-line tee time service would help.
- Customer service has suffered due to lack of staff and limited staff time to handle all calls and customers.

Maintenance

- Golf Course maintenance employs 8 full-time workers and 2 part-time.
- The course has a small maintenance area that is not well located, making it difficult to get equipment onto the golf course.
- The equipment was not in good condition and needs to be improved.

Facility Performance and Data Analysis

Santa Maria is a public golf course generating the vast majority of its revenue totals from green and cart fees. The following paragraphs summarize the facility's activity (rounds), revenue and expenses required to maintain the facilities and service customers.

Activity Levels

The tables below show reported rounds activity at Santa Maria since 2011. The history shows recent increases in activity, and the presence of a clearly defined peak season, with 32% of play coming in May through July.

Santa Maria Golf Course Rounds by Month (FY2011-2014*)					
	2011	2012	2013	2014*	Pct
January	1,475	2,116	1,001	1,847	4.7%
February	1,907	1,875	1,698	1,714	5.6%
March	2,843	3,012	3,286	3,041	9.3%
April	3,350	3,075	3,289	0	9.9%
May	3,453	3,250	3,212	0	10.1%
June	3,351	3,561	3,929	0	11.0%
July	3,263	3,023	4,101	0	10.6%
August	2,702	2,468	3,611	0	8.9%
September	2,322	2,204	3,306	0	8.0%
October	2,563	3,019	3,158	0	8.9%
November	2,088	2,457	2,613	0	7.3%
December	1,767	1,857	1,929	0	5.7%
Total	31,084	31,917	35,133	6,602	100%
% Change		2.7%	10.1%		
Source: BREC Golf Courses. *partial year through April 2014.					

Revenue and Expense Analysis

The table below summarizes Santa Maria's performance over the past four years. As noted previously, Santa Maria is by far the shining star in the BREC Golf System.

Santa Maria Golf Course Summary of Operations – 2011-2014*					
	2011	2012	2013	2014*	2011-2013 Average
Revenue					
Admission Fees (Green Fees)	\$489,974	\$551,705	\$553,378	\$207,157	\$531,686
Equip Rental (Cart Fees)	223,207	221,324	249,341	85,604	231,291
Driving Range	57,221	54,670	77,927	33,558	63,273
Lessons	10,280	4,451	43,895	9,270	19,542
Total Tournament	126,520	165,230	248,276	55,579	180,009
Merchandise	172,082	170,687	152,981	35,285	165,250
Passes	2,335	16,060	125,696	43,225	46,829
Other	40	218	120	1,381	126
Champions Grill	221,920	143,021	160,975	49,052	175,305
Total Revenue	\$1,303,579	\$1,327,366	\$1,612,589	\$520,111	\$1,413,310
Total Avg. Revenue per Round	\$41.94	\$41.59	\$45.90	\$78.78	\$43.21
Cost of Sales (Champions Grill)	\$81,605	\$68,896	\$72,082	\$20,595	\$74,194
Cost of Sales (Merchandise)	\$132,334	\$142,024	\$127,015	\$15,774	\$133,791
Total Cost of Sales	\$213,939	\$210,920	\$199,097	\$36,369	\$207,985
Gross Margin	\$1,089,640	\$1,116,446	\$1,413,492	\$483,742	\$1,279,519
Expense					
Champions Grill					
Wages	\$62,706	\$55,372	\$60,759	\$17,349	\$59,612
Non-Wages	\$10,965	\$10,673	\$10,106	\$3,109	\$10,581
SM Pro Shop					
Wages	\$200,824	\$180,967	\$193,779	\$56,373	\$191,857
Non-Wages	\$230,076	\$205,962	\$255,984	\$36,556	\$230,674
SM Maintenance					
Wages	\$372,049	\$364,075	\$330,520	\$97,535	\$355,548
Non-Wages	\$224,789	\$173,902	\$213,595	\$63,979	\$204,095
Total Expenses	\$1,101,409	\$990,951	\$1,064,743	\$274,901	\$1,052,368
Operating Income (Loss)	(\$11,769)	\$125,495	\$348,749	\$208,841	\$227,151
Source: BREC Golf Courses. *Partial year through April 2014.					

NGF observations regarding Santa Maria performance:

- The grill has essentially been a break-even proposition. It showed a profit in 2011, when the Cost of Sales was at its lowest (50.7%). It showed a slight profit in 2013.
- Grill revenue peaked at \$221,900 in 2011 before falling sharply in 2012 to \$143,000. Last year it rebounded to \$161,000 – essentially the same as in 2010.

- Tournament revenue has increased dramatically. It was \$126,520 in 2011 and \$248,276 last year. This represents an increase of \$121,756 or 95%. Most of this was last year's jump of 50.3% over 2012.
- Green fees also have increased significantly, going up \$63,404 or 13% since 2011.
- Merchandise sales, though, despite the higher volume of play, has actually declined 11% since 2011. The COS for merchandise is good, although it has been trending up. It was 66.4%, fell to 60.6% last year, but has gone up each of the last two years. Last year's 78.5% is higher than it should be, but lowest in the system.
- Cost of sales for food & beverage was 56.4% last year, which is high. It has been well over the 35-40% goal each year. The difference between 56.4% and 35% is \$46,600.
- Total are slightly lower in 2013 than they were in 2011, but 2012 was much lower. Overall, expenses are comparable to national norms for 18-hole public golf courses (**Appendix A**).
- Pro shop expenses have decreased slightly since 2011. However, it has gone up about \$50,000 from 2012, a large portion of which is the \$35,116 in contractor fees, which are the commissions paid to the PGA pros teaching lessons at the facility (this really should be considered a cost of sale).
- Course maintenance expenses have gone down about 8.8%, or \$52,700 since 2011. The total labor expense proportion is 61% in 2013, compared to an industry standard of 50-55%.
- Fertilizers and chemical expenses have decreased in the last three years, despite a sharp increase in the costs for these items. These have a direct effect on the course appearance.
- Maintenance payroll costs have gone down by about \$40,000 during this time frame. Again, though, \$35k of this comes from items no longer being reported.

Summary – Santa Maria Golf Course

Given its location, the potential high quality of the golf course and its amenities, Santa Maria GC has the potential to become the premier public golf course in Baton Rouge, but some upgrade in both operations and physical condition is needed. This golf facility has high quality but needs to upgrade the way it is marketed and promoted, so as to increase the awareness of the facility, not just to area residents, but to area tourists / visitors as well. Further, the property is ideal for large events and golf outings, and this segment needs to be promoted better as well.

This facility is able to handle a much larger volume of golf rounds than is presently being served, with activity reduced due in part to recent economic issues, but also due to limitations in its physical condition. As a note, Santa Maria has the strongest local demographics of any course in the BREC system and there is a high concentration of golfers in the immediate local market.

It is clear that the key issues facing BREC in the Santa Maria operation relate more to the operational and marketing needs of the facility, as opposed to physical improvement. The facility needs adequate staff and given its high revenue, this property will always take up a significant portion of a system manager's time. The course would benefit from some changes that would enhance the overall offering and make the facility more appealing to tournaments and organized events.

ANALYSIS OF WEBB MEMORIAL GOLF COURSE

Webb Memorial Golf Course is an 18-hole regulation-length golf course located in the heart of Baton Rouge, representing a classic example of municipal golf as it was supposed to be – a playable core golf course in a non-rural setting with high activity and lower fees. Webb Memorial is well positioned geographically in Baton Rouge, and the site includes some apparently under-utilized additional park elements that are not presently in the golf system that could be used to help improve the golf facility operation.

Location, Access and Neighborhood

Webb Memorial GC is located in central Baton Rouge, with a site between College Drive and Foster Drive, just north of the Interstate-10 interchange with College Dr. This location proximate to several very large older established neighborhoods, and has proximity to Interstate-10. The Webb Memorial GC property is split by the College Dr., with 13 holes on the northwest side of the street and five holes (#3-7) on the south side.

Webb Memorial Neighborhood

The immediate area around Webb Memorial GC is primarily residential, with other nearby parks. Other key area findings with implications for golf course demand include:

- The local market has a large population base, although there has been minimal growth in the last decade.
- There are 79,500+ households containing 189,600+ persons within five miles of Webb GC. The median household income of these households is \$38,100 in 2013, 24% lower than the overall Parish median of \$47,317.
- The local Webb Memorial area shows several characteristics that tend to coincide with lower-than-average participation in golf, including:
 - 61.6% of households have annual incomes under \$50,000
 - Household golf participation rate is 8.8%, compared to 9.4% for the Parish and 8.3% for Louisiana (total U.S. = 15%).
 - Estimated rounds-per-household is 65% lower than the total U.S. average.

Summary of NGF Findings on Webb Memorial GC

Webb Memorial GC represents a classic municipal golf course well designed to function as a low cost, high volume provider of golf. The golf course appears to be popular with a segment of lower-income value-conscious golfers, particularly seniors, seeking a simple round of golf. The recommendations we have set forth follows this approach and planning. A summary of Key NGF findings on Webb Memorial include:

Site

- Great location that is close to downtown, yet convenient from highway. However, the local neighborhood does not contain many golfers.
- The adjacent park area and amenities were recently renovated. The adjacent park structure includes several under-utilized spaces, including large gymnasium that is the Webb Park fitness center with very little equipment and reported low utilization.

Golf Course

- Regulation par-72 golf course layout with three sets of tees, and an otherwise simple golf layout with few hazards and small greens (re-built in 2005). There is a main canal on the northeast portion of the property affecting several holes and requiring a large bridge to cross. The site is dense with trees that do affect the play of golf in some areas (too narrow) and could be trimmed back. At over 5,200 yards from the forward tee, the course may be too long for women golfers.
- There is no driving range, but there is an open area near the clubhouse that some use for practice, even though the course does not allow this. Staff has considered the addition of some type of “mini-range,” or netted hitting area for use in lessons or golfer warm-up. There are two on-course restroom stations.
- There are some cart paths, but most are in poor condition. There is one major roadway crossing across College Drive that is a busy roadway. One of the holes on the south portion (#7) comes close to the adjacent roadway and errant golf shots have hit autos.
- Overall, the golf course is not in ideal condition. While some improvement will be recommended by NGF, we recognize that given the fee structure it may not be realistic to provide the most outstanding conditions at this facility.
- Site has a newer irrigation system added in 2005. Water is drawn from well on property. This golf course did not report any drainage problems to NGF.

Clubhouse and Other Amenities

- The clubhouse is an older building that is immediately inter-connected to the adjacent park building. The golf portion is only a small pro shop and office.
- There is an open area just to the east of the pro shop of about 2,000 to 2,500 square feet (sf) that provides a nice deck for seating and viewing the golf course. However, the deck is not covered and thus does not get much use.
- The pro shop has very limited storage, and thus is offering a very low quality of goods for sale. There is no formal food and beverage area at this facility, as all F & B is through snacks and vending.
- There is a separate cart shed for storage of carts, but this is in poor condition and needs to be replaced.

Operations

- Staff is not adequate to cover all operations – 1 FT Manager + part-time in operations. The manager on site also has responsibilities at another course (City Park).
- This facility has several active leagues all during the week. Staff reports that activity has been hurt in recent years by a fee increase in 2010. Recent afternoon and other pricing specials have led directly to increased activity. A senior promotion Monday & Thursday for over 50 (\$20 w/ cart) was running at the time of the NGF visit. The regular senior age is 55.

Maintenance

- Golf Course maintenance staff is small with only three full-time employees (plus 3 part-time), and the lead maintenance worker is an assistant superintendent but functions as Superintendent.

- There was not enough maintenance equipment present at Webb to adequately provide the service. A greens mower is needed. The maintenance equipment that is present was not in good condition and needs to be improved.
- Conditions were generally poor. It appeared that watering had been reduced stressing the turf. We note that there had not been rain for nearly one month at the time of the NGF review.

Facility Performance and Data Analysis

The following is a summary of Webb Memorial GC activity (rounds), revenue and expenses required to maintain the facilities and service customers. The table below summarizes Webb Memorial performance over the past four years.

Webb Memorial Golf Course Summary of Operations – 2011-2014*					
	2011	2012	2013	2014*	2011-2013 Average
Rounds	30,861	31,322	31,267	6,367	31,150
Revenue					
Admission Fees (Green Fees)	\$273,341	\$280,717	\$269,579	\$81,169	\$274,546
Equip Rental (Cart Fees)	192,260	181,530	191,616	55,048	188,469
Lessons	0	0	0	0	0
Total Tournament	4,995	6,787	8,134	8,410	6,639
Merchandise	39,994	36,671	37,185	10,465	37,950
Passes	950	11,125	58,158	21,234	22,867
Other	39	551	(20)	(8)	190
Food Snacks	40,789	25,879	27,005	7,998	31,224
Total Revenue	\$552,368	\$543,260	\$591,657	\$184,316	\$561,884
Total Avg. Revenue per Round	\$17.90	\$17.34	\$18.92	\$28.95	\$18.04
Cost of Sales					
Cost of Sales (Food / Snacks)	\$13,625	\$14,782	\$16,195	\$1,685	\$14,867
Cost of Sales (Merchandise)	\$34,897	\$27,556	\$31,043	\$1,989	\$31,165
Total Cost of Sales	\$48,522	\$42,338	\$47,238	\$3,674	\$46,033
Gross Margin	\$503,846	\$500,922	\$544,419	\$180,642	\$530,719
Expense					
SM Pro Shop					
Wages	\$175,035	\$153,480	\$156,390	\$46,477	\$161,635
Non-Wages	\$66,547	\$57,866	\$139,135	\$33,983	\$87,849
SM Maintenance					
Wages	\$222,737	\$184,882	\$205,722	\$59,715	\$204,447
Non-Wages	\$102,385	\$86,570	\$115,848	\$33,915	\$101,601
Total Expenses	\$566,704	\$482,798	\$617,095	\$174,090	\$555,532
Operating Income (Loss)	(\$62,858)	\$18,124	(\$72,676)	\$6,552	(\$24,814)
Source: BREC Golf Courses. *Partial year through April 2014.					

Other observations include:

- Revenue has declined \$42,808 since 2010, although the actual decline is closer to \$100,000 when pass sales is figured in. Playing fees have held steady the last two years at around \$470,000.
- Cost of sales for food & beverage was 60% last year, by far the best of the facilities lacking a snack bar. However, the COS for merchandise is high sales at 83%.
- Total expenses went from \$566,000 in 2011, down to \$482,000 in 2012 then back to \$617,000 in 2013. Over the period since 2011, course maintenance expenses have increased slightly, but pro shop expenses have increased by over \$50,000 since 2011 and over \$84,000 since 2012. Electricity declined by \$5,802 in the four year period.
- Fertilizers and chemical spending, also directly related to course conditions, has decreased from \$24,000 to just \$19,000 in 2013, a drop of \$5,000 or 21%.
- Equipment repair costs, meanwhile have increased by \$8,423 or 24%.

Summary – Webb Memorial Golf Course

With the addition of a few new elements to help improve the food and beverage service (a new covering for the deck and/or consider re-purpose the adjacent fitness center), Webb Memorial GC has the potential to improve its economic performance, but some investment will be required. The facility is able to handle a much larger volume of golf rounds than is presently being served, and NGF recommended improvements should help restore rounds activity. It is clear that the key issue facing BREC in the Webb Memorial operation is how to best add to the volume of activity at this facility through increasing the organized event schedule of tournaments, outings, charity functions, etc., although this will require some upgrade to the golf course playing area as well as ancillary amenities.

ANALYSIS OF BEAVER CREEK GOLF COURSE

Beaver Creek Golf Course is the newest facility (2001) in the BREC system, and represents a high quality golf facility with great potential to attract golfers from a wide area. The facility has a somewhat remote location and thus will always be challenged to attract non-local golfers. As such, the quality of golf course and adjacent amenities will always have to be superior. Like Santa Maria, the course was developed by the Parish as a centerpiece amenity to a newer residential development of some 80 +/- homes. This property represents a fully modern golf facility with a high quality golf course layout, but a generally small clubhouse that can limit activity. Despite the 'premier' quality of the property, the remote location and lower rounds totals lead to a much lower total revenue than could be expected from this type of facility, although it is still the second highest in the BREC system.

Location, Access and Neighborhood

Beaver Creek GC is located at the northern edge of East Baton Rouge Parish, approximately 15 miles north of central Baton Rouge. Primary access to the facility is via Port Hudson Plains Rd., which is a generally undeveloped and rural roadway near Zachary, LA. As a result, this course is neither proximate nor convenient to major roadways in the area and requires a strong destination draw for golfers.

Local Beaver Creek Neighborhood

Beaver Creek is surrounded primarily by residential elements, with vast stretches of undeveloped rural and farmland parts of the Parish. Other key area findings with implications for golf course demand include:

- The local market is extremely small with some growth experienced in the last decade. NGF estimates just over 5,000 households containing 14,400 persons within five miles of the course. The median household income of these households is \$72,978 in 2013, 54% higher than the overall Parish median of \$47,317.
- Within five miles of Beaver Creek GC, the demographics show some characteristics associated with strong demand for golf per household, but the total number of households leads to a very small overall local golf market:
 - Household golf participation rate is 12.4%, compared to 9.4% for the Parish and 8.3% for Louisiana (total U.S. = 15%).
 - Estimated rounds of golf per household is well over three times (300%) the total U.S. average, but only 627 golfing households are projected to be within five miles of the course.

Summary of NGF Findings on Beaver Creek GC

Beaver Creek GC represents a challenging, yet enjoyable golf course that is aesthetically appealing but has some features that can create a high level of difficulty for both golfers and maintenance crews. The golf course has amenities that could attract regional golfers, but overall awareness of the course will have to be improved. A summary of Key NGF findings on Beaver Creek include:

Golf Course

- Championship par-72 golf course layout with four sets of tees, numerous hazards and many design features commonly associated with high quality golf. This golf course has far too many bunkers, many of which are also very large. The bunkers do need to be reduced to help player enjoyment, speed of play and maintenance.
- The course features good quality, modern Tif-Eagle greens that are becoming more popular with golfers. There is limited drainage in front of the greens, which are sloped back to front creating drainage problems.
- While the golf course is of high quality, some of the little niceties and amenities of golf are missing from Beaver Creek, such as ball washers, benches, water coolers, pin location flags, etc.
- The course has some other issues related to its original construction that still cause problems today. The soil is generally a harder, clay soil that doesn't drain well. The site contains many sink holes and new ones are reported after heavy rains. Some sink holes are caused by drainage pipes not being sealed, so dirt and water get in.
- This course has a modern, lighted driving range. However, the lights are rarely used, and night demand has been very sparse when staff tried to use the lights and open at night, leading to increased electric costs. Of note, Beaver Creek is still using a token-operated range ball dispensing machine, which is becoming much less common in modern golf. Range tokens can be expensive and are frequently lost or even 'hoarded' by customers. Staff reported spending over \$750 on tokens last year.

Clubhouse and Other Amenities

- The overall presentation is high quality, with newer features and nice touches and treatments. However, the facility is small and space programming is not ideal. There is room for a full grill operation, but the present set up offers very limited seating.
- High quality golf courses (like Beaver Creek), especially those in rural locations, typically rely on a large volume of organized events and tournaments to survive. However, in order to host these events there needs to be adequate indoor or

covered outdoor space to serve large groups after tournaments. The small clubhouse at Beaver Creek does not allow for this option.

- Carts are stored in a separate cart shed, which is adequate and in good condition.
- The pro shop is small, but fairly well stocked considering the size. Sales focus on impulse items (balls, gloves, hats, towels, etc.), and apparel (appropriate).

Operations

- Staff is not adequate to cover all operations – 1 FT Manager + part-time in operations + volunteers. There is a high reliance on volunteers at this facility as staff is sparse.
- Beaver Creek staff is reporting problems related to the carts. Beaver Creek has 72 carts, mostly used and reconditioned carts that require constant repair. Seven carts are now down and not in working order, pending a warranty repair. It was reported that these repairs can take several weeks, which is a problem.
- The fees at Beaver Creek are an interesting mix. The Monday-Thur – fees include a \$20 for seniors and \$25 for the public. This started as winter special two years ago, but last year just kept it year round because play had dropped so much when it was discontinued. The regular posted rate is \$42 WE senior and \$50 public (same as Santa Maria), which is too high for Beaver Creek.

Food and Beverage

- The food and beverage operation at Beaver Creek appears somewhat problematic, but reflective of budget realities and limited resources. The facility does not generate enough activity to justify a large expense on the F & B. operation, but the fact that the course is limited in activity is partially due to the reduced F & B operation.
- This grill operation was closed for all of 2011 and 2012, re-opened in 2013 with reduced hours (only Wednesday – Sunday and two part-time employees. BREC did report to NGF that a new F & B Manager is being added to Beaver Creek in 2014, and the facility will then be a 7-day operation.
- Staff reported that Beaver Creek had tried various efforts to stimulate non-golf use of the F & B service, even going as far as to promote a Friday night dinner with a low price. This was not successful in attracting customers and was discontinued.
- The facilities are adequate for a good golf course food and beverage service, but the organization, commitment and physical layout are limiting factors.

Maintenance

- This facility is maintained by a staff of 7 full-time and 2 part time maintenance workers. There is a full-time mechanic at this location. However, some of the maintenance personnel have responsibilities at other courses. Also, it was reported to NGF that the lead superintendent at this location is retiring so a new super will have to be added, possibly coming in from another BREC location.
- NGF saw some evidence and there are reports of some problems with disease and other turf intrusion on the greens. Fairy Ring is prevalent on the greens and green surrounds. It is estimated to cost \$10,000 to eradicate. This type of problem tends to look worse than it actually is, so they are getting by.
- Irrigation appears to be adequate. The system is newer and there is water storage on site (lake). There is some concern that the watering will add to the sinkhole problem, so staff has to be careful.
- There are problems with the equipment at Beaver Creek. The Greens mower is 5 years old, tee mowers 10-11 years old and a Fairway mower 9 years old. There is

need for a second tee mower, especially to get the course ready for earlier tee times. The course has a Greens Roller to smooth out greens (very nice for players), but staff is limited so it is not used, except for tournaments. There is also a need for a smaller trim mower for use under trees.

- Bunkers at Beaver Creek should be considered for reduction in both size and number. There are problems with drainage and there is just so much total surface space of bunkers that it is hard for staff to keep up with maintenance. The result is bunkers are often in very poor condition, which affects customer enjoyment.

Facility Performance and Data Analysis

Beaver Creek is a public golf course generating the vast majority of its revenue totals from green and cart fees. The following paragraphs summarize the facility's activity (rounds), revenue and expenses required to maintain the facilities and service customers.

Activity Levels

The tables below show reported rounds activity at Beaver Creek since 2011. The history shows recent increases in activity, and the presence of a clearly defined peak season, with 43% of play coming in April through July.

Beaver Creek Golf Course Rounds by Month (FY2011-2014*)					
	2011	2012	2013	2014*	Pct
January	679	1,017	776	875	4.4%
February	861	846	904	1,130	4.7%
March	1,286	1,478	1,852	1,878	8.2%
April	1,986	2,282	1,848	0	10.9%
May	2,028	2,273	2,264	0	11.7%
June	1,429	2,033	2,318	0	10.3%
July	1,614	1,698	2,400	0	10.2%
August	1,086	1,501	2,331	0	8.8%
September	1,015	1,527	1,920	0	8.0%
October	1,766	1,706	2,112	0	9.9%
November	1,076	1,240	1,372	0	6.6%
December	1,720	818	1,060	0	6.4%
Total	16,546	18,419	21,157	3,883	100%
% Change		11.3%	14.9%		
Source: BREC Golf Courses. *partial year through April 2014.					

Revenue and Expense Analysis

The table below summarizes Beaver Creek's performance over the past four years. As noted previously, Beaver Creek is by far the shining star in the BREC Golf System.

Beaver Creek Golf Course Summary of Operations – 2011-2014*					
	2011	2012	2013	2014*	2011-2013 Average
Revenue					
Admission Fees (Green Fees)	\$273,703	\$324,174	\$352,729	\$118,891	\$316,869
Equip Rental (Cart Fees)	186,724	160,732	137,347	62,052	161,601
Driving Range	21,030	23,373	34,153	12,728	26,185
Lessons	0	0	0	0	0
Total Tournament	25,232	34,581	26,158	21,051	28,657
Merchandise	40,069	37,809	49,872	17,017	42,583
Passes	154,771	135,597	8,544	8,835	76,937
Other	0	22	130	20	51
Champions Grill	64,034	27,600	33,603	18,907	41,746
Total Revenue	\$765,563	\$743,888	\$642,536	\$259,501	\$694,628
Total Avg. Revenue per Round	\$46.27	\$40.39	\$30.37	\$66.83	\$37.13
Cost of Sales (Creek Café)	\$34,458	\$17,053	\$32,069	\$11,075	\$27,860
Cost of Sales (Merchandise)	\$29,680	\$26,490	\$37,440	\$8,294	\$31,203
Total Cost of Sales	\$64,138	\$43,543	\$69,509	\$19,369	\$59,063
Gross Margin	\$701,425	\$700,345	\$573,027	\$240,132	\$663,425
Expense					
Creek Café					
Wages	\$30,344	\$6,880	\$5,070	\$6,437	\$14,098
Non-Wages	\$3,874	\$6,760	\$5,209	\$1,022	\$5,281
SM Pro Shop					
Wages	\$152,985	\$141,609	\$147,721	\$42,951	\$147,438
Non-Wages	\$153,859	\$63,328	\$128,324	\$22,652	\$115,170
SM Maintenance					
Wages	\$246,114	\$203,036	\$172,315	\$48,441	\$207,155
Non-Wages	\$185,874	\$189,681	\$227,637	\$50,990	\$201,064
Total Expenses	\$773,050	\$611,294	\$686,276	\$172,493	\$690,207
Operating Income (Loss)	(\$71,625)	\$89,051	(\$113,249)	\$67,639	(\$26,782)
Source: BREC Golf Courses. *Partial year through April 2014.					

Beaver Creek shows improvement in revenue and net income from 2011 to 2013, although this is misleading. This is because in 2011, BREC reported \$135,000 in pass sales at Beaver Creek, as it allocated all the 7-day passes to Beaver Creek. In 2013, when actual pass sales were used, the Pass sales were only \$8,544. Other observations include:

- Café sales fell from \$64,034 in 2011 to \$33,594 in 2013.
- Green fees, though, have increased 29% or \$76,694.

- Despite an increase in rounds, cart sales have decreased by 25% in the last two years. This, may be a reflection of the course combining green and cart fees in discount specials, all of which are recorded as green fees.
- The combined playing fees, cart fees and tournament fees have increased by 5% or \$25,449, going from \$490,785 to \$516,234.
- Food & Beverage cost of sales was very high, at 95.4% in 2013. A possible contributing factor was that for most of this time the grill was closed so the COS for the food and beverage will be closer to retail than it would be if it were a grill. Merchandise cost of sales, though, is good at 71.7%.
- Pro shop expenses had declined in 2012, and increased again in 2013. Course maintenance expenses have dropped sharply, going from \$472,179 in 2010 to \$388,083 last year. This equates to an 18% decline. All of the decline comes from payroll, which has declined by \$111,401. However, Beaver Creek with all its sand bunkers and sink holes, is labor intensive. The drop in payroll is likely to have resulted in deteriorating course conditions.
- Raw wages accounted for just 44% of course maintenance expenses in 2013, the lowest in the system and more typical of the national average.
- Fertilizer and chemical expense, though, has increased from \$50,955 to \$68,040. However, we have been told that a lot of these chemicals and fertilizer are sent to other courses under the course superintendent's authority as these courses do not have enough in their budget to cover the cost.

Summary – Beaver Creek Golf Course

Given the quality of the golf course at Beaver Creek, this facility has the potential to become one of the more popular premium courses in the region, and thus produce strong revenue. However, the course is located in a very rural part of the Parish and there is very little population in proximity. Thus, this facility will have to operate as a 'destination' property, meaning its target markets will not be living close by but will have to be enticed to come up for a quality round of golf. For this structure to work, the facility and all its ancillary amenities have to be of high quality for customers to justify the longer trip.

It is clear that the key issue facing BREC in the Beaver Creek operation is what to do to expand and improve the facility, given the fact that this investment may not return new revenue immediately, but over time improvement in the facility should improve performance. An improved and expanded food and beverage operation (possibly a tournament pavilion) at Beaver Creek will improve the ability to attract additional golf events (tournaments, outings, etc.), thus enhancing revenue.

ANALYSIS OF HISTORIC CITY PARK GOLF COURSE

City Park is an excellent 9-hole course that could be considered one of the top 9-hole courses in the region. There are many in the golf industry that believe the notion that 9-hole courses are worth the time, suggesting that in today's time-urgent society they are actually a perfect alternative to spending five or more hours dealing with a full 18-hole round and all its rituals.

City Park is promoted as the oldest golf course in operation in Baton Rouge, dating to 1926. The Parish has added the phrase 'Historic' in front of the City Park name in all materials, emphasizing the historic importance of this 9-hole facility in the center of Baton Rouge. While course dates back to 1926, there was an extensive renovation in 2007. NGF Consulting believes that City Park is best preserved as a classic style course, with details at every turn following the look and feel of the c. 1920s clubhouse and pleasant 9-hole layout that unfolds on the simple, sloping terrain.

Location, Access and Neighborhood

City Park GC is located in central Baton Rouge, in the heart of the City and proximate to the convergence of Interstate Highways I-10, I-110, and I-12. Access to the property is via Park Blvd., which becomes Dalrymple Dr at the intersection with City Park Av. This location is proximate to several key central elements of Baton Rouge, including Louisiana State University (LSU), located less than two miles away and just across City Park Lake. The City Park GC property is bisected by an east-west railway, and includes three of the southernmost holes directly on City Park Lake.

City Park Neighborhood

The immediate area around City Park GC is primarily residential, with dense population, the LSU campus and other nearby parks. Other key area findings with implications for golf course demand include:

- The local market has a large population base with modest growth in the last decade.
- There are 62,600+ households containing 154,200+ persons within five miles of City Park GC. The median household income of these households is \$35,100 in 2013, 26% lower than the overall Parish median of \$47,317.
- The local City Park area shows several characteristics that tend to coincide with lower-than-average participation in golf, including:
 - 61.6% of households have annual incomes under \$50,000
 - Household golf participation rate is 8.7%, compared to 9.4% for the Parish and 8.3% for Louisiana (total U.S. = 15%).
 - Estimated rounds-per-household is 45% lower than the total U.S. average.

Summary of NGF Findings on City Park GC

Historic City Park GC represents a classic older 9-hole municipal golf course in a great inner-city location with beautiful surroundings. The golf course appears to be popular with a segment of golfers, but also a segment of historic preservationists trying to preserve the property and have it registered as a 'Historic Site' (Friends of City Park) and prevent other movements seeking to close the park. The golf course immediately adjoins (and shares parking) with other park elements, such as a large museum. From a golf perspective, this course is unique in that it is the only golf course in the BREC system (and one of few in area) with elevation changes. A summary of Key NGF findings on City Park include:

Golf Course

- Shorter ('executive') 9-hole golf course playing 1,876 to 2,300 yards and a par of 32. There are five par-4's and three par-3's. This type of golf course is popular with less skilled players and beginners.
- The site is dense with trees that do affect the play of golf in some areas with low hanging branches and dense canopies. These trees interfere with play and can be dangerous for golfers.
- Despite the renovation in 2007, there are still seven original greens. These greens were resurfaced in 2007, but not fully rebuilt. There is no driving range and practice amenities are limited. There are no on-course restroom stations. The signage is limited and sometimes it is not clear where to go from the green to the next hole. There is a railroad crossing at grade carts.
- The golf course has a newer irrigation system added in 2006. The course is supposed to draw from City Park Lake, but the pump is reportedly not working and the existing system is filled with silt. The course does not drain particularly well and it gets wet, so carts are limited after rain leading to lost revenue (no cart paths). Staff estimates they lose 50 days/year to rain with the wet greens.

Clubhouse and Other Amenities

- The clubhouse is an older building that is immediately inter-connected to the adjacent museum / park building. The golf portion is only a small pro shop and office.
- The pro shop has very limited storage, and thus is offering a very low quantity of goods for sale. There is no formal food and beverage area at this facility, as all F & B is through snacks and vending.
- The golf building includes a small enclosed area behind the pro shop currently used for storage of the small number of carts needed for the operation. This area is not included in the HVAC system for the facility. As the course has no F & B or grill operation, it may be a consideration to consider converting this space into a small snack bar or grill, and adding cart storage elsewhere. The snack bar/grill could then service the golf course and adjacent park.

Operations

- Staff is not adequate to cover all operations – 1 FT Asst. Manager + part-time in operations. The manager on site also has responsibilities at another course (Webb Park).
- This facility has very low green fees. The advertised and posted fees may even be too low, making better golfers think the course must be very poor. While the lower fees are appropriate for the many LSU/college-age golfers who use the course, a separate rate for others may actually add to the appeal.
- This facility has 35 carts, but will have to go to 28 due to lack of space for storage. As noted, new cart storage could free up existing cart storage for other uses (e.g. snack bar/grill).

Maintenance

- Golf Course maintenance staff is small, with only one full-time superintendent and one part-time employee.
- There was not enough maintenance equipment present at City Park to adequately provide the service. A greens mower is needed. The maintenance equipment that is present was not in good condition and needs to be improved.

- Conditions were generally adequate, except for the greens which were less than ideal. This golf course needs an arborist to help with the trees and at least remove dead trees and lower limbs.
- Staff reported that the pump for the well on site is not working for over a year. BREC should look into this as it may cost under \$10,000 to solve a major problem. As a result, this course is using City water to irrigate (expensive) as there is not enough pressure to run the well system.

Facility Performance and Data Analysis

The following is a summary of City Park GC activity (rounds), revenue and expenses required to maintain the facilities and service customers. The table below summarizes City Park performance over the past four years.

City Park Golf Course Summary of Operations – 2011-2014*					
	2011	2012	2013	2014*	2011-2013 Average
Rounds	17,658	16,335	14,875	3,255	16,289
Revenue					
Admission Fees (Green Fees)	\$124,329	\$117,542	\$88,445	\$36,179	\$110,105
Equip Rental (Cart Fees)	85,209	80,592	62,057	25,662	75,953
Lessons	0	0	0	0	0
Total Tournament	0	0	0	0	0
Merchandise	(740)	1,815	1,397	1,804	824
Passes	15,817	15,184	9,836	4,385	13,612
Other	87,290	71,356	4,861	2,710	41,554
Food Snacks	179	15	(130)	(12)	21
Total Revenue	12,563	10,340	7,669	3,200	10,191
Total Avg. Revenue per Round	\$324,647	\$296,844	\$174,135	\$73,928	\$252,261
Cost of Sales					
Cost of Sales (Food/Snacks)	\$4,143	\$6,200	\$7,592	\$1,072	\$5,978
Cost of Sales (Merchandise)	\$10,372	\$10,701	\$8,233	\$3,736	\$9,769
Total Cost of Sales	\$14,515	\$16,901	\$15,825	\$4,808	\$15,747
Gross Margin	\$310,132	\$279,943	\$158,310	\$69,120	\$242,492
Expense					
SM Pro Shop					
Wages	\$100,126	\$90,553	\$82,860	\$24,471	\$91,180
Non-Wages	\$54,747	\$28,930	\$26,685	\$5,767	\$36,787
SM Maintenance					
Wages	\$89,188	\$89,159	\$72,565	\$18,346	\$83,637
Non-Wages	\$30,156	\$30,906	\$31,458	\$8,999	\$30,840
Total Expenses	\$274,217	\$239,548	\$213,568	\$57,583	\$242,444
Operating Income (Loss)	\$35,915	\$40,395	(\$55,258)	\$11,537	\$48
Source: BREC Golf Courses. *Partial year through April 2014.					

Other observations include:

- There was a dramatic drop in playing fees last year, from \$209,500 to \$150,400 (28%). We believe most of this can be attributed to changing from an all-day fee to offering a very inexpensive nine-hole fee. Staff reports a lot of golfers abuse the 9-hole fee and play more than nine holes, as they are used to the previous all-day fee. We would recommend returning to the all-day fee at City Park.
- Cost of sales for food and beverage was 99% last year, which is very high and is should be reviewed more closely by BREC.
- Merchandise cost of sales was also very high at 83.7%.
- Maintenance expenses have declined by 22% since 2011. However, payroll alone has decreased by \$17,000. Payroll makes up 70% of the maintenance expense.
- Fertilizer and chemical expenditures have gone down 28%, from \$11,451 to just \$8,294.

Summary – City Park Golf Course

Given its location, NGF expects that City Park will be able to generate rounds activity that is at least as strong as any other 9-hole golf course in this market area. The concern from NGF is that the Parish will view the lower revenues associated with a 9-hole operation as a reason to reduce expense budgets, putting the quality of the product (greens) even more at risk. The facility is such that it needs some upgrade to make it more appealing, but this facility also needs to be priced appropriately, meaning both fee increases and well as decreases (more later in the report).

ANALYSIS OF DUMAS GOLF COURSE

Dumas Golf Course is an 18-hole regulation-length golf course located north of the City of Baton Rouge, on property shared with Greenwood Community Park, and in immediate proximity to another BREC golf facility at J.S. Clark Park. This golf facility has the benefit of the newest (2011) golf clubhouse (in the BREC system) and is part of a bigger park facility with several elements including a boat launch, outdoor deck and indoor theater. The course is an example of a park-like public golf course in a natural setting with very little surrounding elements in direct contact with the golf course. The change in clubhouse location caused some change to the sequencing of the golf layout, and changed the entrance of the golf course from Lavey Ln on the north side of the property, to the main Greenwood Park entrance on Scotland-Zachary Highway.

Location, Access and Neighborhood

The Dumas Golf Course is located at the northern portion of the Greenwood Community Park, which is north of Baton Rouge, between Scotland-Zachary Hwy (19), Lavey Ln (3006) and Thomas Rd (423). BREC's First Tee facility is at J.S. Clark Park, which is along Thomas Rd at the south end of the Dumas / Greenwood Park site. Surrounding elements are a mix of residential and industrial, and the site is 2.5 miles from the Baton Rouge Metropolitan Airport.

Dumas Golf Course Neighborhood

The implications of the local Dumas market area as related to golf course demand include:

- The local market has a modest population base, with almost zero growth for more than a decade.
- There are 21,600+ households containing 62,200+ persons within five miles of Dumas GC. The median household income of these households is \$38,100 in 2013, 24% lower than the overall Parish median of \$47,317.

- The local Dumas Golf Course area shows several characteristics that tend to coincide with lower-than-average participation in golf, including:
 - 60.6% of households have annual incomes under \$50,000
 - Household golf participation rate is 8.3%, compared to 9.4% for the Parish and 8.3% for Louisiana (total U.S. = 15%).
 - Estimated rounds-per-household is 45% lower than the total U.S. average.

Summary of NGF Findings on Dumas GC

Dumas GC is part of the Greenwood Park with all its amenities. A summary of Key NGF findings on Dumas Golf Course include:

Golf Course

- Regulation par-71 golf course layout with three sets of tees, and an otherwise simple golf layout with few hazards and small “push-up” greens. Some of these greens were re-built in 2006 with the change in clubhouse and the need to re-route the golf course. The newer greens (and older ones) were built with no formal greens mix for underlying soil, using pure sand with some top soil mixed in as the base.
- The course is generally shorter, and has a most forward tee at 4,650 yards, which is ideal for women players. However, there are some features that make this a harder golf course than it should be given the shorter length. There are numerous dense trees, including a tree in the middle of the 10th hole.
- There is no driving range at present. At the time of the NGF review, BREC was in the beginning stages of the conversion of hole #18 from a par-3 hole to a par-4, which is more ‘traditionally appropriate’ finishing hole for an 18-hole golf course. However, in this case, BREC may find it far more useful and profitable to use the space being considered for the new 18th hole as a driving range instead.
- Overall, the golf course is not in ideal condition. There is no formal irrigation system and staff must hand water the golf course. This deficiency is obvious in several places on the golf course where turf health and playing conditions are poor. The course uses expensive City water to irrigate greens and tees, although on course water lines are small with limited pressure. This course is also reported to have some drainage issues leading to wet and sometimes unplayable conditions after rain.

Clubhouse and Other Amenities

- The clubhouse is a brand new multi-purpose building added in 2011. The facility includes all key elements for a golf clubhouse, including snack bar/grill, pro shop area and restrooms. There is a large indoor theater that can be used to host larger golf events and banquets.
- The pro shop and food / beverage elements are in one combined space. This location provides a pleasant overlook to the park amenities (lake, boats, deck), but gives a very limited view of the golf course and key locations, such as the first tee.
- There is no formal cart storage, and carts are stored outdoors.

Operations

- Staff is not adequate to cover all operations – 1 FT Manager + part-time in operations. The on-site is new to this property (previously at Santa Maria), and was brought over to help improve the operations, especially grill operations.

- This facility has recently become more active in selling leagues, adding new golfer programs and increasing the level of on-line information (has own *Facebook* page). The manager is working to attract the Executive Women's golf league to Dumas.
- Another issue of concern reported to NGF was non-golf use of this property. This is especially significant in the area of the former clubhouse site on Lavey Ln where there is still an entrance and parking lot. The recent reductions in staff have led to reductions in on-course marshaling.
- The pro shop/merchandising operation is very small, and there is space to expand. However, the merchandise budget to purchase items for resale is also very small (\$20,000), leading to the limited inventory.

Maintenance

- Golf Course maintenance staff is small (4 FT and 2 PT), and maintenance staff at Dumas also has responsibility at JS Clark, totaling over 220 acres and further limiting resources.
- There was not enough maintenance equipment present at Dumas to adequately provide the service. The facility only has gang mowers (large) and little equipment for 'detail' maintenance such as fairway mowers (1) and greens mowers (1). The maintenance equipment that is present was not in good condition and needs to be improved.
- As a result of limited resources and limited equipment, the maintenance at Dumas is very basic and adds to the lower quality of the golf course. For example, all fairway and rough grass are mowed at one height. Also, as underlying soil is not good, the greens are very hard and changing hole-locations can be a problem.
- The irrigation situation is also problematic. As there is no formal system, watering is done by hand and the system of City water has very limited pressure. As such, only a few places on the course can be watered at the same time. Greens are only watered 2-3 times per week, tees 1-2 times per week and so on. There is no storage capacity for irrigation water further complicating the irrigation. Drainage is also poor so golf course is very wet after heavy rain.

Food & Beverage

- The new clubhouse added at Dumas has drastically changed the F & B service and added a new revenue source to the facility. The 'Waterfront Café' has immediately added over \$30,000 in revenue and the facility serves other non-golf park patrons. In fact, staff reports to NGF that most of the F & B sales are NOT to golfers.
- The menu at the Waterfront Café is limited, with three deli sandwiches (\$4 to \$6.75), burgers / dogs (\$3 to \$5.50), snacks and drinks. Domestic beer is \$3.25. This facility is also one of the few in the BREC system that is able to sell beer and alcohol, beginning the practice in 2013.
- Dumas does not have Beverage cart, but started using regular cart with cooler on weekends with good success (personnel is limited for staffing bev. cart).

Facility Performance and Data Analysis

The following is a summary of Dumas GC activity (rounds), revenue and expenses required to maintain the facilities and service customers. The table below summarizes Dumas Golf Course performance over the past four years.

Dumas Golf Course Summary of Operations – 2011-2014*					
	2011	2012	2013	2014*	2011-2013 Average
Rounds	15,104	15,114	16,158	3,050	15,459
Revenue					
Admission Fees (Green Fees)	\$116,049	\$113,864	\$118,185	\$39,729	\$116,033
Equip Rental (Cart Fees)	114,204	105,353	121,473	44,989	113,677
Driving Range	0	0	0	0	0
Lessons	0	0	0	0	0
Total Tournament	4,907	4,975	5,615	6,552	5,166
Merchandise	16,984	17,704	15,470	9,408	16,719
Passes	3,451	3,700	25,206	6,455	9,703
Other	11,694	(82)	492	609	4,035
Food Snacks	5,271	39,992	36,532	11,375	27,265
Total Revenue	\$272,560	\$285,506	\$322,973	\$119,117	\$292,597
Total Avg. Revenue per Round	\$18.05	\$18.89	\$19.99	\$39.05	\$18.93
Cost of Sales					
Cost of Sales (Waterfront Café)	\$7,526	\$28,264	\$31,941	\$9,695	\$22,577
Cost of Sales (Merchandise)	\$28,835	\$15,093	\$11,113	\$2,993	\$18,347
Total Cost of Sales	\$36,361	\$43,357	\$43,054	\$12,688	\$40,924
Gross Margin	\$236,199	\$242,149	\$279,919	\$106,429	\$274,250
Expense					
Waterfront Café					
Wages	\$4,968	\$25,999	\$26,535	\$8,794	\$19,167
Non-Wages	\$1,320	\$2,018	\$2,115	\$939	\$1,818
SM Pro Shop					
Wages	\$144,333	\$140,007	\$144,146	\$40,637	\$142,829
Non-Wages	\$79,972	\$34,970	\$88,322	\$7,237	\$67,755
SM Maintenance					
Wages	\$245,131	\$222,298	\$218,030	\$63,862	\$228,486
Non-Wages	\$79,194	\$103,561	\$94,008	\$30,927	\$92,254
Total Expenses	\$554,918	\$528,853	\$573,156	\$152,396	\$552,309
Operating Income (Loss)	(\$318,719)	(\$286,704)	(\$293,237)	(\$45,967)	(\$278,059)

Source: BREC Golf Courses. *Partial year through April 2014.

The Dumas golf operation is clearly one of the most challenging for the BREC system, with the highest total subsidy required on operations. The net loss on operations in 2011 was well over \$300,000, although this did improve slightly in the last two years. However, the actual subsidy required in 2013 may be worse given that some \$21,000 in pass sales were included in 2013 revenue and that was not considered in 2011 or 2012. There was also a change in payroll accounting as noted previously. Other observations include:

- The Café did not open until 2012 when it had \$40,000 in revenue. Sales declined last year to \$36,500.
- Playing fees (green fees, cart fees, tournament fees) have been very steady since 2011.
- Merchandise sales COS was 70.4% last year, which is fully within industry standards.
- Course maintenance expenses have increased slightly from \$297,000 to \$305,000 last year. Raw wages accounted for 71% of payroll expenses, which is very high.
- Fertilizer and chemical expenses were just \$14,005 last year, which is very low for an 18-hole course and is \$4,800 less than in 2011.
- Pro shop expenses had declined from 2011 to 2012, increasing again in 2013. Most of the changes have come in non-labor expenses. Electricity expenses, for example, have been highly variable at this location.

Summary – Dumas Golf Course

Dumas GC has potential to be a better performer than it is at present, but it has one key issue facing its operation – the course is just not good enough for better golfers and thus its market is generally less skilled players and beginners. The course is not well maintained and has limited irrigation to make it better. The new clubhouse is a nice attraction, but much of the use is from non-golfers using other Greenwood Park amenities.

As a result, the issues facing BREC in this operation are whether to try and continue keeping the golf course intact, while generating the system's largest economic losses. The proximity to J.S. Clark / First Tee provides some benefit to Dumas, but better tie-in between the facilities is needed. Dumas should become the golf course that is the "next step" for beginners who learn at First Tee. If BREC is to continue with Dumas as a golf facility, some commitment will be necessary to improve the condition of the golf course and make the course more appealing for a wider range of golf customers.

ANALYSIS OF HOWELL PARK GOLF COURSE

The Howell Park Golf Course is the most unique and economically challenged golf facility in BREC Golf system. The facility is operating at an extremely low level of revenue, but with its ultra-low cost structure, the result is not the worst net income in the system. Howell park dates back to the 1950s and is designed as a simple core golf course with Hurricane Creek running through the center of the property. The course was once very popular with area seniors, and particularly older, retired military veterans. In recent years, the neighborhood has changed and these golfer communities no longer reside in the area, and golf activity has been in steady decline for many years.

Location, Access and Neighborhood

Howell Park GC is located in northeast Baton Rouge, with a site essentially bounded by Elm Dr. to the west, Linden St. to the north, E. Brookstown Dr. to the east and Winbourne Ave. to the south. Entrance to the property is from Winbourne Ave., through the main entrance to Howell Park and its other amenities. The golf course shares the parking lot with the other amenities in Howell Park, including a gymnasium, ball fields, tennis courts and other park amenities. This location proximate to several very large older established neighborhoods, and the adjacent park elements are in heavy use, while the golf use has declined.

Howell Park Neighborhood

The immediate area around Howell Park GC is primarily residential, with a few commercial elements. Other key area findings with implications for golf course demand include:

- The local market has a relatively large population base, although there has been minimal growth in the last decade.
- There are 67,000+ households containing 175,600+ persons within five miles of Howell Park GC. The median household income of these households is \$37,300 in 2013, 25% lower than the overall Parish median of \$47,317.
- The local Howell Park area shows several characteristics that tend to coincide with lower-than-average participation in golf, including:
 - 59.6% of households have annual incomes under \$50,000
 - Household golf participation rate is 8.2%, compared to 9.4% for the Parish and 8.3% for Louisiana (total U.S. = 15%).
 - Estimated rounds-per-household is 60% lower than the total U.S. average.

Summary of NGF Findings on Howell Park GC

Howell Park GC represents a classic small municipal golf course with an open layout, shorter / easier golf holes all in a compact setting making for ease of walking. The course would appeal to much less skilled golfers and other on a budget, seeking lower fee golf. As the local surrounding neighborhood does not have a strong tradition with golf, this facility will have to be very active in local community outreach if it is to remain viable as a golf facility. At present, the golf course site is dealing with unapproved use of the site for activities other than golf, including some field sports and general passing through from the course to surrounding neighborhoods. There have been incidents associated with golfer safety reported to NGF from these unapproved uses. A summary of Key NGF findings on Howell Park include:

Facility

- This is a shorter golf course, playing to a par of 70 and length from 5,662 yards (longest tee) to 4,442 (shortest tee). The Hurricane Creek runs through the property and there are five bridges required for crossing. NGF also noted some locations where the creek edges are caving in, causing problems for the golf course. The creek comes into play on seven of the golf holes. The site is generally open with few trees, although the course does include a large number of bunkers that may be inappropriate for this type of shorter, beginner-friendly golf course.
- This course is now over 60 years old. There were plans to upgrade this facility in the last decade, but BREC decided against a renovation to add irrigation, improve the golf course and possibly even replace the clubhouse. The course still has original Bermuda greens that very small are well past their useful life.
- The irrigation situation is also problematic at this location. The course uses City water and pressure/volume is low. Greens are only watered 2-3 times per week, tees 1-2 time per week and so on.
- There is no driving range at Howell Park. Staff is trying to start a First Tee Program (March 2014) at the site and are using an open field for practice just off the golf course where they are adding a few small target greens. The space has a shelter, but no building. There is one on-course restroom/shelter near the intersection of 4th, 7th, 16th and 15th holes.
- Overall, the golf course is in poor condition and many features and amenities will require significant investment to improve to acceptable standards. While NGF will

recommend some improvement, we recognize that given the fee structure it may not be realistic to provide the most outstanding conditions at this facility.

- The clubhouse is very small and older building with very limited amenities. There is a small counter for snacks and very limited inventory in the shop. The facility is not properly air-conditioned, as an older (and noisy) window unit was in use at the time of the NGF review.
- Carts are stored in an adjacent holding area that seems to be in rough condition, and barely adequate for the job. There are 60 electric carts, but the course does not attract the volume to fully utilize the fleet.

Operations/ Maintenance

- Staff is not adequate to cover all operations – 1 FT Manager + part-time in operations. The on-site manager has been at Howell Park for more than 10 years and knows the property and clientele very well. There are four PT clerks and 4 PT cart attendants.
- This facility does not have leagues or any active programming.
- Golf Course maintenance staff is small (3 FT), and the lead maintenance worker is an assistant superintendent but functions as Superintendent.
- There was not enough maintenance equipment present at Howell Park to adequately provide the service. A fairway mower is especially needed. The maintenance equipment that is present was not in good condition and needs to be improved. Most pieces are in excess of 10 years old, and a few have been “handed down” from other courses like Santa Maria and Beaver Creek.
- Conditions were generally poor, although it was reported to NGF that conditions had improved in the last two to three years.

Facility Performance and Data Analysis

The following is a summary of Howell Park GC activity (rounds), revenue and expenses required to maintain the facilities and service customers. The table below summarizes Howell Park performance over the past four years.

**Howell Park Golf Course
Summary of Operations – 2011-2014***

	2011	2012	2013	2014*	2011-2013 Average
Rounds	12,028	10,171	8,550	2,072	10,250
Revenue					
Admission Fees (Green Fees)	\$68,628	\$64,467	\$50,078	\$17,226	\$61,058
Equip Rental (Cart Fees)	75,316	61,614	50,869	16,598	62,600
Driving Range	0	0	0	0	0
Lessons	0	0	0	0	0
Total Tournament	5,336	12,440	4,746	3,380	7,507
Merchandise	5,836	4,381	4,026	1,385	4,748
Passes	120	0	8,550	4,490	3,290
Other	0	0	14	(8)	5
Food Snacks	11,154	8,015	7,411	3,344	8,860
Total Revenue	\$166,390	\$150,917	\$125,694	\$46,415	\$148,067
Total Avg. Revenue per Round	\$13.83	\$14.84	\$14.70	\$22.40	\$14.45
Cost of Sales (Food / Snacks)	\$5,775	\$6,709	\$7,121	\$1,685	\$6,535
Cost of Sales (Merchandise)	\$6,655	\$4,786	\$3,596	\$1,989	\$5,012
Total Cost of Sales	\$12,430	\$11,495	\$10,717	\$3,674	\$11,547
Gross Margin	\$153,960	\$139,422	\$114,977	\$42,741	\$143,055
Expense					
SM Pro Shop					
Wages	\$132,575	\$119,231	\$98,818	\$31,168	\$116,875
Non-Wages	\$86,401	\$43,617	\$46,513	\$14,280	\$58,844
SM Maintenance					
Wages	\$98,828	\$92,226	\$88,168	\$24,713	\$93,074
Non-Wages	\$43,441	\$43,183	\$77,906	\$11,636	\$54,843
Total Expenses	\$361,245	\$298,257	\$311,405	\$81,797	\$323,636
Operating Income (Loss)	(\$207,285)	(\$158,835)	(\$196,428)	(\$39,056)	(\$180,581)

Source: BREC Golf Courses. *Partial year through April 2014.

Howell is clearly the most problematic of the BREC golf facilities. With revenues hovering around \$150,000 to \$160,000 in 2011 and 2012, this facility was barely able to cover the most basic operational budget. In 2013, rounds and revenue fell to the lowest totals ever recorded, further adding to the financial pressure of the golf course. Still, the expense structure has now been reduced to such a great extent that the overall subsidy required to sustain the operation is not the highest in the system. However, the expenses are so low that it is not adequate to maintain the facility and the declines in condition are likely to get much worse without some investment in capital improvements, additional maintenance and adequate staff.

Other observations include:

- Revenue has suffered a very sharp drop of nearly a third, going from \$166,390 in 2010 to just \$125,694 last year. Thus, the amount of subsidy actually exceeds the total revenue collected.
- Cost of sales for the food and beverage was very high at 96.1%

- Merchandise cost of sales was 89% last year, down from over 100% each of the previous three years.
- Course maintenance expenses have dropped 19% or \$19,656 since 2011.
- Course maintenance payroll accounted for \$13,709 of this amount. Raw wages accounted for 62% of the maintenance costs in 2013.
- We suspect that at least some of the decline in supplies is from these costs being absorbed by other courses than a lack of spending.

Summary – Howell Park Golf Course

Given its facility type, location and the amount of improvement that will be needed at this property, it is clear to NGF that Howell Park GC will always represent a challenge for BREC. This property is not earning enough revenue to cover appropriate basic expenses, and it has some capital needs that NGF is recommending be delayed until a formal plan for the future of the property can be completed.

Given the popularity adjacent park elements, it seems to NGF that a full golf course is not an appropriate fit for this location and some re-purposing of the facility into more widely accepted park uses may be appropriate.

ANALYSIS OF J.S. CLARK / FIRST TEE OF BATON ROUGE

J.S. Clark GC is a good quality short 9-hole golf course with a very active driving range at a location along in immediate proximity to Dumas GC and Greenwood Park. The facility has a full First Tee facility, including classroom instruction. The course dates back to the 1950s, and has important history in Baton Rouge as one of the original golf facilities open for African Americans during the segregation era.

Today the golf holes at J.S. Clark are an odd assortment of water holes with an open setting for holes #3 through #8 that are totally appropriate for beginners and other less-skilled players, especially juniors. NGF Consulting believes that the J.S. Clark Course is an ideal location and site at which to celebrate the Parish's commitment to bringing new players to the game. While the J.S. Clark golf facility is economically challenged, this facility has some strong justification for taxpayer support in that it is a "feeder facility" that is generating new golfers that can ultimately graduate the facility and seek golf service at other BREC courses.

Location, Access and Neighborhood

J.S. Clark / First Tee is located north of the City of Baton Rouge, on property shared with Dumas GC and Greenwood Community Park. This golf facility has the benefit of a newer (mid 2000s) golf clubhouse (in the BREC system) and includes elements designed for beginners and the First Tee program. The course is an example of a park-like public golf course in a natural setting with a lighted driving range at a busy intersection and very little surrounding elements in direct contact with the golf facility.

The facility is accessed via Thomas Rd, very close to the intersection with Scotland-Zachary Ave (Highway 19). This location makes the facility convenient and accessible from a wide geographic area, and makes it easier for parents to bring their kids to the site for golf classes.

J.S. Clark Neighborhood

The implications of the local J.S. Clark / First Tee site are very similar to the neighboring Dumas GC:

- The local market has a modest population base, with almost zero growth for more than a decade.
- There are 21,200+ households containing 68,200+ persons within five miles of Dumas GC. The median household income of these households is \$35,200 in 2013, 26% lower than the overall Parish median of \$47,317.
- The local Dumas Golf Course area shows several characteristics that tend to coincide with lower-than-average participation in golf, including:
 - 61.6% of households have annual incomes under \$50,000
 - Household golf participation rate is 7.7% (lowest in BREC system), compared to 9.4% for the Parish and 8.3% for Louisiana (total U.S. = 15%).
 - Estimated rounds-per-household is 40% lower than the total U.S. average.

Summary of NGF Findings on J.S. Clark GC

J.S. Clark is presently being operated as a First Tee facility, utilizing several of the programs key elements. The facility is set up to appeal to mostly juniors, with some other less-skilled golfers using the 9-hole golf course. The site was renovated in 2002 to create the First Tee amenities and set up the present program. A summary of Key NGF findings on J.S. Clark include:

- The course is fully irrigated (one of the few), although the course does use expensive City water for irrigation. The pump is reported to not be working properly and needs replacement. Also, several sprinkler heads are not functioning, and have not been functioning for many years, including several on the greens that have resulted in large bare areas.
- New clubhouse added in the mid-2000s, and includes a small shop, snack area and First Tee classroom.
- The site includes a large lighted driving range, although staff reports the range is not used much at night due to budget and safety concerns. Range balls were dispensed automatically with a token system that was discontinued some years ago by the site manager.
- The GM at this location was the only PGA golf professional stationed at a BREC golf course at the time of the NGF review (although this has changed since). This is appropriate given the high level of programming and beginner activity at this location.
- This golf course has only one full-time maintenance person assigned to the site. His primary responsibility is to mow grass and support is provided from the Dumas maintenance staff. There is a position to be filled at this site, but staff will always be light and thus conditions less than ideal, but not unreasonable considering the use of the facility and heavily junior/beginner clientele.

Facility Performance and Data Analysis

The following is a summary of J.S. Clark / First Tee performance:

J.S. Clark Golf Course Summary of Operations – 2011-2014*					
	2011	2012	2013	2014*	2011-2013 Average
Rounds	7,551	6,772	5,627	1,028	6,650
Revenue					
Admission Fees (Green Fees)	\$41,503	\$37,812	\$37,169	\$12,494	\$38,828
Equip Rental (Cart Fees)	26,833	24,428	24,865	7,891	25,375
Driving Range	14,004	13,209	14,632	8,045	13,948
Developmental Golf / First Tee	22,420	8,465	18,371	3,302	16,419
Total Tournament	(21)	(872)	1,132	0	80
Merchandise	8,778	7,966	6,727	2,650	7,824
Passes	260	0	2,000	450	678
Other	0	98	299	20	132
Food Service	6,439	4,609	3,990	1,527	5,013
Total Revenue	\$120,216	\$95,715	\$109,185	\$36,379	\$108,296
Total Avg. Revenue per Round	\$15.92	\$14.13	\$19.40	\$35.39	\$16.29
Cost of Sales					
Cost of Sales (Food / Snacks)	\$2,526	\$3,085	\$3,333	\$945	\$2,981
Cost of Sales (Merchandise)	\$15,236	\$11,568	\$4,662	\$1,799	\$10,489
Total Cost of Sales	\$17,762	\$14,653	\$7,995	\$2,744	\$13,470
Gross Margin	\$102,454	\$81,062	\$101,190	\$33,635	\$97,808
Expense					
1 st Tee / Developmental Golf					
Wages	\$93,725	\$91,370	\$102,571	\$31,313	\$95,889
Non-Wages	\$28,361	\$14,562	\$11,244	\$8,155	\$18,056
SM Pro Shop					
Wages	\$99,884	\$86,141	\$91,851	\$38,933	\$92,625
Non-Wages	\$39,021	\$20,430	\$22,916	\$7,814	\$27,456
SM Maintenance					
Wages	\$40,879	\$35,052	\$40,036	\$11,300	\$38,656
Non-Wages	\$37,571	\$31,293	\$46,793	\$4,371	\$38,552
Total Expenses	\$339,441	\$278,848	\$315,411	\$101,886	\$311,233
Operating Income (Loss)	(\$236,987)	(\$197,786)	(\$214,221)	(\$68,251)	(\$213,426)

Source: BREC Golf Courses. *Partial year through April 2014.

Like other facilities in the BREC golf system, the J.S. Clark / First Tee facility is experiencing a larger subsidy on operations in each of the years reviewed by NGF. However, the overall net at this facility is improving, although the direct net income from the First Tee operation has remained steady at around -\$95,000 to -\$97,000 per year. And since Pass sales were just \$2,000 last year, they do not account for the improvement in profitability. Other observations include:

- Total facility revenue has declined by about 15% to 20% since 2010. Most of this drop occurred in 2012, when revenues fell from \$120,216 in 2011 to \$95,715 in 2012.
- Cost of sales for F&B was 83.5% in 2014, which is high. However, merchandise COS was just 69.3%, which is good.
- Raw wages accounted for 51% of the maintenance expenses. However, the course maintenance payroll is likely inflated. When we visited the course, there was just ONE course maintenance person. The person who is assigned to Clark is actually working at Dumas. Thus the Dumas payroll, which was high to begin with, is actually higher.
- Fertilizer and chemical expenses have increased by \$6,000 since 2011, but are still relatively low at a combined \$12,000.
- The biggest decline is in vehicle maintenance, which was \$11,095 in 2011 and just \$42 last year.
- Pro shop expenses have also gone down, decreasing \$10,671 or 9% from 2010. Payroll, though accounts for all of it and more as it has declined by \$11,601.
- Notably, telephone expenses have increased from \$4,625 in 2011 to \$12,744 last year.

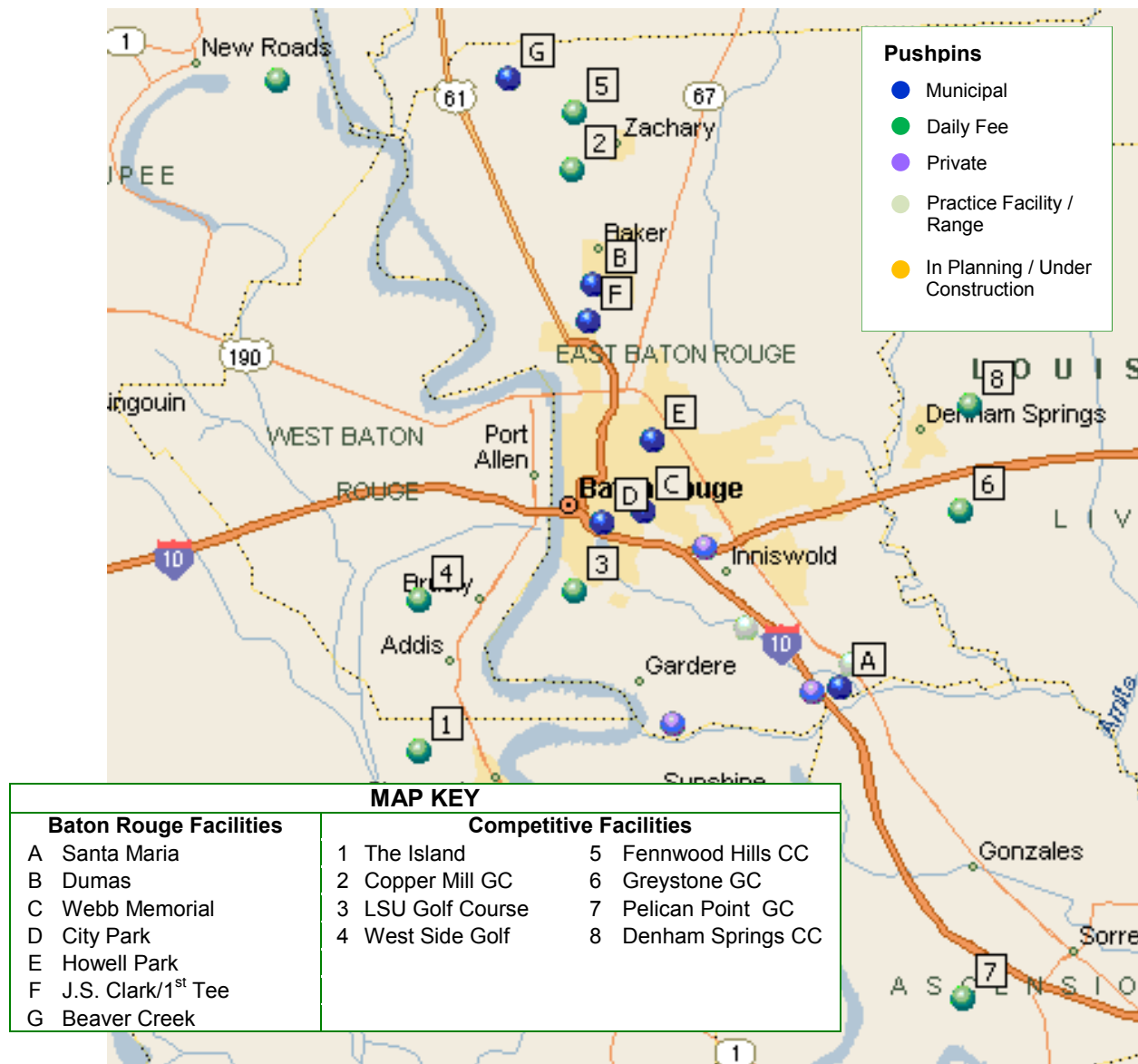
Summary – J.S. Clark / First Tee of Baton Rouge

The First Tee elements at J.S. Clark Park provide a great opportunity for the BREC Golf Division in the opportunity to help increase the number of golfers in Baton Rouge, thus increasing revenue at other BREC Golf facilities. However, this activity could ultimately be converted to another BREC facility and not necessarily tied to J.S. Clark. Some form of beginner-oriented facility will have a key place in the Parish golf system, and there is potential for greater revenue at the First Tee operation, either at this or another location. The result is a facility in the BREC system that can be a strong source for new player development, and, as such, economic losses at this type of facility should be acceptable to the Parish.

Baton Rouge Area Competitive Golf Market

NGF has reviewed the operations eight other golf courses believed to reflect a representative sample of the key competitors for the various BREC Golf courses. These facilities were identified based on several factors, including type and proximity of facility, price, and selection and input from BREC Golf staff. In addition, the NGF team had conducted a series of “secret shopper” reviews of the subject BREC Golf courses as well as several of the identified competitors.

MAP OF COMPETITIVE FACILITIES



SUMMARY INFORMATION – KEY COMPETITORS

In the tables that follow, NGF Consulting presents summary operational information for a subset of golf facilities we've identified as potential competitors to BREC Golf facilities. In a market such as Baton Rouge where there is much quality public golf to be enjoyed at very affordable rates, it can be difficult to precisely determine who is competing with whom. NGF experience shows that when there is strong value and a variety of golf experiences available in a market, many avid golfers exhibit a willingness to travel for up to an hour or more to occasionally play golf courses other than their "home" club, so the list of facilities selected for comparison is by no means intended to be exhaustive.

Identified Competitors – Summary Information					
Golf Facility	Location	Type	Year Open	Par / Slope	Front Tee / Back Tee
The Island	Iberville	DF-18	1999	72 / 135	5,406 / 7,010
Copper Mill Golf Club	Zachary	DFRD-18	2003	72 / 134	4,693 / 6,866
LSU Golf Course	Baton Rouge	UN-18	1961	72 / 129	4,991 / 6,772
West Side Golf	Brushly	DF-18	1963	72/123	6,215 / 5,077
Fennwood Hills Country Club	Zachary	DF-9	1998	72 / 125	6,477 / 5,227
Pelican Point GC	Gonzales	DF-27	1997	*	*
Greystone Golf Course	Denham Springs	DF-18	2006	72 / 129	6,800 / 5,000
Denham Springs CC	Denham Springs	DF-18	2006	70 / 121	6,800 / 5,000
Type: DF – Daily Fee; DFRD – daily fee with real estate; MU – Municipal; UN – University. *also includes a 9-hole executive course. N/A = not available					

Summary Operating Data – Key Competitors

Summary Operating Data – Key Competitors								
Golf Facility	2013 Total Rounds	WD Green Fee	WE Green Fee	Senior Fee	Senior WE	Twilight (WD/WE)	Individual Membership (7-day)	18-H Cart Fee
Santa Maria	35,587	\$28.00	\$38.00	\$22.00	\$30.00	\$22.00/\$30.00	\$1,700	\$12.00
Beaver Creek	21,756	\$13.00	\$38.00	\$8.00	\$18.00	\$15.00/\$30.00	\$1,700	\$12.00
Webb Memorial	31,644	\$15.00	\$18.00	\$13.00	\$16.00	\$13.00/\$16.00	\$550	\$12.00
Dumas	16,691	\$12.00	\$14.00	\$9.00	\$12.00	\$9.00/\$12.00	\$550	\$12.00
Howell Park	8,635	\$10.00	\$12.00	\$7.50	\$10.00	\$7.50/\$10.00	\$550	\$12.00
City Park	15,196	\$10.00	\$12.00	\$8.00	\$10.00	\$8.00/\$10.00	\$550	\$12.00
Clark	6,117	\$10.00	\$12.00	\$8.00	\$10.00	\$8.00/\$10.00	\$550	\$12.00
The Island	22,000	\$32.00	\$42.00	\$9.50	N/A	\$35.00/\$35.00	\$1,140	\$18.00
Copper Mill	20,000	\$38.00	\$44.00	\$30.00	\$35.00	\$29.00/\$35.00	\$1,560	\$12.00
LSU	44,752	\$15.00	\$25.00	\$12.00	\$17.00	\$17.00/\$20.00	N/A	\$10.00
West Side Golf	N/A	\$10.00	\$15.00	\$22.00	N/A	N/A	N/A	\$12.00
Fennwood Hills	N/A	\$25.00	\$30.00	\$8.00	N/A	N/A	\$1,176	\$12.00
Pelican Point - Links	35,000	\$45.00	\$60.00	\$40.00	N/A	\$45.00/\$55.00	N/A	\$12.00
Pelican Point - "Get Ready"	19,000	\$15.00	\$25.00	N/A	N/A	N/A	N/A	\$10.00
Greystone	N/A	\$55.00	\$65.00	\$45.00	\$55.00	\$35.00/\$45.00	N/A	\$14.00
Denham Springs CC	N/A	\$15.00	\$25.00	N/A	N/A	N/A	\$1,320	\$12.00
KEY N/A – Information not available DNA – Does not apply 1 – Punch card for 20 9-hole rounds. 2 – Louisiana Resident / Non-Resident								

SIGNIFICANT FINDINGS

- **Market Domination:** BREC has 7 of the 16 courses, putting the Parish's system in position to dominate the market, although some enhancement will be required.
- **Shrinkage:** There has been considerable shrinkage in the supply of golf courses in the Baton Rouge market over the past five years. In total, 25% of the golf supply, in terms of holes of golf, has closed. This provides opportunities for BREC courses to make significant gains, but adequate golf course conditions will be required.
- **Rounds:** The average number of rounds reported was 23,032. LSU was by far the busiest with over 44,000 rounds. Followed by Santa Maria at 35,587. Santa Maria and Webb were the only BREC courses performing above the average. In fact, Clark and Howell appear to have the fewest rounds by far of any course in the area. The average for 18-hole regulation courses is 26,229.
- **Weekday Fee:** The average weekday green fee is \$21.76. Only Santa Maria is higher at \$28. When taking cart into consideration, the average playing fee is \$30.44. What is notable is the grouping of courses. Eleven of the 16 courses are priced between \$20 and \$27, including all the BREC courses except Santa Maria. This makes that market highly competitive. Copper Mill and Santa Maria are priced similar (\$38 and \$40), then there is a small jump to Pelican Point (\$45), The Island (\$50) and Greystone (\$55). Based on quality, there would appear to be some room for Santa Maria and Beaver Creek to move upwards.
- **Weekend Fee:** The average green fee was \$29.69 and combined playing fee \$38.38. Although there is a bit more spread, the courses still are clustered. Seven of the courses are priced between \$24 and \$30, including 5 BREC courses; two more are at \$35, one (Copper Mill) at \$44, two at \$50 (Beaver Creek and Santa Maria) and three over \$60 (The Island, Pelican Point and Greystone). Again, there would appear to be significant room for Santa Maria to move upwards. Perhaps the most notable thing is the difference between the weekday and weekend rates. The average increase is 27%, but Beaver Creek at 100% is the big outlier. When it is removed, the average drops to 22.1%. However, the five BREC courses have the lowest increase, ranging from 11.1% at Webb to just 8.3% at Dumas. The next lowest is Copper Mill at 15.8% and Greystone at 18.2%. This suggests that there is room for a higher spread.

NGF Consulting Recommendations for BREC Golf

Based on our physical, operations and market review of the BREC Golf System, NGF has formulated recommendations that the Recreation Commission can use to enhance the BREC Golf System for the future. The NGF team has identified key areas of concern in our review of operations, and we now begin our presentation of specific and actionable recommendations that we believe will help BREC significantly improve the operation of the golf facilities. These recommendations include several key system-wide improvements, as well as several on-site improvements that can be adopted at all locations. Many of NGF Consulting's recommendations involve the implementation of golf "industry best practices" that can be implemented on-site at each location.

The NGF recommendations contained in the review for the BREC Golf System include: (1) considerations for the basic operating structure and operating philosophy of the system; (2) changes and/or improvements that could be made to the physical plant of the system; and (3) specific ideas for improving the operation, marketing and thus profitability of the system.

NGF BREC OBSERVATIONS

The NGF team offers a quick summary review of the most important key findings and observations on the BREC Golf System operation that form the basis for NGF recommendations:

- The BREC Golf System has traditionally been run as a public accommodation, relying on taxpayers to support operational shortfalls. NGF believes the Golf system could be improved to function more like a business enterprise, thus requiring as little taxpayer support as possible.
- The current resources being devoted to operate and maintain BREC golf courses are not sufficient, and the facilities and their economic performance are suffering due to limited budgets. Put simply, the BREC golf system is not sustainable "as-is," and some change is required if these courses are to remain viable. The most important finding from NGF is that it is not possible to cut your way to success in golf.
- Despite inadequate resources, many in the BREC administration and golfing public are expecting a high quality of service and conditions. It is important to communicate that these two positions are not compatible and not possible.
- The BREC golf system needs to have a strong central golf administration to oversee ALL golf facility operations, with devoted on-site management at each location. The Golf Operations Supervisor position will be required regardless of operational structure for the golf courses that is chosen by BREC.
- BREC is facing a key decision tree for the future of golf in the Parish. If BREC is to remain in the business of providing golf service to the general public, then some commitment to the system is required and new investment in both day-to-day resources and capital infrastructure will be required.
- The external (and uncontrollable) market climate is not favorable for strong economic performance of golf facilities. The Baton Rouge area is not a strong golf market and there are large populations without a strong history or tradition in the game. The

golfer population is aging and there is weak golfer demand coming from the younger generations behind them.

- There are probably too many golf courses within the BREC golf system. This system will probably operate best with a total of:
 - One or Two premium 18-hole courses, with strong geographic diversity (opposite ends of the parish);
 - One middle quality 18-hole course;
 - One middle quality 9-hole course; and
 - One facility with a driving range to be focused on the development of beginners and less-skilled players.

OPERATING PHILOSOPHY: PARK MODEL VS BUSINESS MODEL

With municipal golf operations, there are two general and radically different operating philosophies: The Park Model and the Business Model. Under the Park Model, the golf operations are treated very much like other parks and amenities that are generally within the Parks and Recreation department. As such, the golf courses are not expected to make a profit or even be self-sufficient. They are viewed strictly as an amenity to the citizens of the municipality and viewed in the same light as other subsidized recreational opportunities such as tennis, swimming and parks.

The Business Model, however, sees the golf operation as a business not as an amenity. The business model further recognizes that not only is the golf operation a business, but it is also one that is competing with other businesses in the same field. And while the importance of golf as an amenity to the citizens is still emphasized, the business model also stresses the importance of the “bottom line.” Unlike other recreational activities within the municipality, the golf system is expected to be self-supporting. In many cases, it may even help support other non-golf programs. Even if the golf system does not achieve self-sufficiency, the emphasis is on profitability. In other words, if the golf system is to become more self-sufficient, it needs to be run more like a business and less like a park.

The key issues related to this key strategic decision include:

- **Expenses v. Profit** - In the Parks Model, the emphasis is on controlling expenses with little attention to improving revenue and profitability. Managers are rewarded more on their ability to control expenses and not on generating revenues. In the Business Model, the emphasis is put on the “bottom line.” As such, revenues and expenses are given equal weight. This will have implications in many areas of the BREC system, including inventory, capital investment, staffing and the basic idea of “spending money to make money.”
- **Bureaucracy v. Efficiency** - The Park Model tends to focus on its role as a government entity and embraces bureaucracy. The Business Model understands the need for efficiency, which means eliminating unnecessary bureaucracy in order to operate both faster and more efficient. In the business world, the concept of “time is money” is well understood, and while the need for controls is also important, it must be balanced and appropriate. There are examples of how BREC’s park-model bureaucracy is hampering the Golf Division’s ability to make a profit. Many of these are based on the fact that BREC treats the golf system as it would any other park, requiring the golf courses to utilize BREC’s resources for all golf needs, rather than allow the system to handle needs independently.

STRUCTURE CONSIDERATIONS

In reviewing the long term operations of the BREC Golf System, the Parish could consider options to replace the existing self-operated structure with a new form of direct, on-site operation. As noted previously, one of the biggest roadblocks is in the bureaucratic structure of BREC and the “Park Model” way of operation. If increasing profitability is to become a primary consideration, then BREC could consider restructuring of the Golf Division and how it interacts with the rest of the Commission.

As part of our study review for the BREC Golf System, the NGF has identified five (5) basic operational structures for the Parish to consider in the continued operation of the BREC Golf System. Each of these options has advantages and disadvantages, but the overriding issue with this particular system is the challenging golf market environment, the need to adopt more of a “business model,” and the need for extensive marketing, promotion and customer service (staffing). Our summary review of the options includes:

1. **Self-Operation.** This is essentially the “status-quo” option. Self-managed would mean that ALL employees and managers remain as direct employees of BREC. The main advantage is that the Parish retains total control over the facilities and all operations, retains all revenue and is responsible for all expense. The biggest disadvantage of this structure is much of the “park model” issues NGF has documented stem from this system. Thus, if BREC is to remain self-operated, some significant change will have to be implemented. As a note, the self-operation model is still the most common form of operation for municipal golf nationwide.
2. **Concession Agreements or Personal Services Contract.** A Personal Services Contract is very similar to a management contract, with an individual as opposed to a company. A concession contract is similar and can function more like a lease agreement. The key areas of operation include Pro Shop, Food and Beverage, and/or Maintenance. Although a personal services contract could be just for the services of the individual, the contract could also be structured to where the employees of the operation become employees of the contractor. It is possible for BREC to consider entering into one or more separate agreements for each functional area and at each facility. As a result, it is possible that BREC could be overseeing as many as 21 different contracts, for each functional area at each of seven golf courses. This type of contract was popular among municipalities in previous decades, but has fallen out of favor in the last 20 to 25 years.
3. **Full-Service Management Contract.** This structure essentially involves BREC paying a management fee to a private vendor to operate all aspects of each of the seven (or fewer) BREC golf courses. This type of third-party management is growing in popularity and there are several very well-qualified firms to engage in this type of service. The fees are usually around \$50,000 (+/-) per golf facility, although there may be some flexibility in multi-course systems like BREC with varying types of facilities. Advantages and disadvantages of Management Contracts include:
 - In municipalities with multiple facilities, management contracts can help to streamline disjointed operations into one single and efficient structure.
 - Alignment of Management Company interests with the municipality/owner.
 - Marketing and overall operating cohesion and effectiveness is generally maximized.
 - Operating costs are usually reduced as all staff employed by the private vendor.
 - Municipality will have less control of facilities than self-operation.

- The municipality still needs a Golf System manager to oversee contract.
- Unlike an operating lease, management contracts do not provide a guaranteed income for the municipality, and the fixed portion of the management fee is guaranteed as long as the contract provisions have been met. Therefore, positive net operating income to the municipality is not assured (operating risk remains with Parish).
- Unlike with a lease agreement, the municipality would still be responsible for the capital improvements (a key issue with BREC).

These contracts work best when they are incentive-based. Ideally, the Parish will want to create an “alignment of interests” so that if the management company is doing well, the Parish is doing well and vice versa.

4. **Lease.** The entire 7-facility golf system could be leased to a private golf company (or individual), who would be responsible for all operating expenses as well as capital upkeep. The lease can be structured to provide an annual lease payment to the Parish, and the lease could be established to include certain lessee requirements, including capital investment in facility improvements maintenance standards and/or restrictions regarding green fees. The key advantage of this structure is the shifting of all risk from the Parish to the private lease partner.

The key disadvantage is the loss of control in the operation and the growing difficulty in finding a qualified vendor willing to accept the risk, especially when large-scale capital investment is required. Other disadvantages include limitations on financing (probably not compatible with Municipal bonds), long-term contracts, and maintaining appropriate contract compliance.

5. **Hybrid Contract.** A hybrid contract combines some of the advantages of a lease with those of a management contract. Hybrid contracts typically do not include large-scale capital improvement on the part of the contractor, but some management companies may be willing to include some of the capital recommendations contained in this report in exchange for a longer-term contract and higher management fees. The advantages and disadvantages to the hybrid contract are basically the same as the management contract, except that the arrangement is generally more flexible and provides for a greater sharing of revenues and assumption of risk by the operator – as is the case with BREC.

Discussion

The NGF review of the various operational considerations for the BREC Golf facilities shows that two of the four options presented are probably not the best fit for BREC and can be eliminated from further evaluation:

- **Outright Lease.** The NGF review of the lease option shows that leasing may not be fully allowable under Parish provisions due to the possible conveyance of park property. Five of the seven BREC golf facilities (Dumas, City Park, Webb, Howell and JS Clark) are located on Park property that may also have restrictions on “conveyance” that may apply under a lease option.
- **Concessions.** BREC is likely not equipped to create a system with multiple concessionaires operating smaller portions of the BREC golf system. It is conceivable that BREC could end up managing upwards of 21 different contracts (one each for three key service areas at seven golf courses), or some combination thereof. This structure does not seem like a right fit for the BREC golf system in 2014 and beyond.

In light of this, NGF sees the continued self-operation structure, with enhancements, or some form of management agreement as the two most appropriate options for the Parish going forward. However, NGF must also note that if the Parish opts to pursue a management agreement for BREC golf courses, the key issues that must be addressed prior to making the evaluation include the issue of whether to include one, some, or all of the BREC facilities in the agreement.

One, Some, or All of the BREC Golf Facilities

Another consideration for BREC if it considers a new management arrangement for the golf system is which of the golf courses will be placed within this structure. As noted above there are likely restrictions on the park properties, leaving only Santa Maria and Beaver Creek as likely targets of private management. However, these are two of the strongest revenue producers for the system and thus splitting up the system may put BREC at an even greater disadvantage. There may also be the possibility that a private vendor will want only certain facilities that they deem most profitable (Santa Maria, Beaver Creek), leaving BREC with its lower-performing golf courses. Other issues to consider include:

- Some facilities in the system may not be overly profitable, but serve some other “public purpose” such as recreation amenity or economic development driver (City Park, JS Clark).
- If the BREC does not commit to a management agreement model at all seven facilities (retaining some as self-operated), the Parish may find itself competing with its own golf properties for customers and market share.
- Several of the BREC golf facilities would benefit from infrastructure upgrades that will require a high level of capital to complete.

NGF MANAGEMENT / STRUCTURE RECOMMENDATION

NGF recommends that the BREC keep its golf system intact and continue with its present form of self-operation, but with enhancements as noted by NGF. Continued improvements in maintenance, management and marketing should lead to improved economics, making the BREC Golf system more sustainable. However, if the improvements in operation do not lead to improved financial performance than some form of outside management will be the next logical step.

If the Parish were to enact this step after a 3-4 year period of attempted improvement, the new operating structure should be a single-source management agreement for the six primary golf courses. This would mean that operation of the BREC golf system would be contracted to a single entity that would have full control of the day-to-day operations, including the pro shops, food and beverage operations and maintenance. This structure, if properly implemented, is believed by NGF to offer BREC an opportunity for improvement in both revenues and expenses, and allow for a streamlined operation with appropriate alignment of interests.

It is of utmost importance that if a new single-source management agreement for the six golf courses is to be undertaken after 3 or 4 years that it be structured with the following key terms included in the master agreement:

- **Be a “Hybrid” agreement** – Involve a low fixed management fee to the operator and include a variable portion that helps spread the risk to the operator.

- **Pooled Revenue** – All revenue to the facilities is treated equally, with division between BREC and the private operator based on a split covering all revenue centers.
- **Include Some Capital Investment** – Encourages the private vendor to contribute capital to the properties, which would be in their interest given the recommended investments are designed to increase revenue.
- **Firm Standards** – The agreement should be structured with firm standards on operations, fees, maintenance, marketing, and use of technology. It would be expected that many (if not all) of the basic operational recommendations made by NGF in this report would be incorporated into the standards contained in a new operating agreement.
- **Strong Contract Compliance** – BREC must establish practices that ensure full compliance with all terms within the new contract, subject to periodic reviews and/or inspections by BREC staff, or an independent third party.

REPURPOSE OF ONE OR MORE OF BREC GOLF COURSES

Another option the BREC can consider to help improve the overall financial condition of the golf system would be to repurpose one (or more) of the system's golf courses for use other than golf. This could come in the form of modifying one (or more) of the five golf courses that sit on park property into more "passive" park space, or active in other sports (ball fields, etc.). As previously noted, the NGF believes that there are probably too many golf courses within the BREC golf system, and the system would work best with three 18-hole courses, one 9-hole course and one training facility. The Parish has asked the NGF to consider this option under the idea that the repurposing of a golf course would reduce overall operating expense, thus improve the Golf Fund's financial position.

Upon review of this possibility, the NGF team has considered repurpose options for each of the seven BREC golf facilities. The review shows:

- Two of the BREC golf courses (Santa Maria and Beaver Creek) occupy property that is part of master-planned and co-developed real estate communities that would be difficult to separate and find an alternate use for golf.
- Two other properties (Webb and City Park) occupy properties that are part of large and centrally-located parks that have great potential for golf if improved, and thus should be kept open to provide golf service to the largest number of constituents.

Candidates for Repurpose

Given the exceptions noted above, the NGF team recommends that only three of the BREC facilities be considered for repurposing to other uses. These include (listed in order of priority for repurpose):

- **Howell Park.** This facility is clearly not sustainable "as-is," and the community that surrounds it is not embracing the tradition of Howell as a golf course. Further, the adjacent park uses are very popular and expanding these uses onto the Howell Park GC, and repurposing this site with new ball fields and other open space uses would make sense.
- **JS Clark.** This facility has significant tradition and history, but is economically challenged and its primary elements could be moved to another location. BREC

should consider a possible merger of elements at JS Clark to be combined with Dumas GC, if a new driving range were to be added at Dumas GC.

- **Dumas GC.** Dumas GC is not in ideal condition, does not have formal irrigation and will need a large amount of capital to bring to a quality level that is fully marketable. However, this facility has recently added a new clubhouse, although this clubhouse in design and function does not necessarily have a fit only for golf. It is conceivable that the Dumas clubhouse would be an appropriate fit for a First Tee facility if the J.S. Clark program is moved over to Dumas as recommended by NGF.

NGF Recommendation

The NGF team's recommendations on repurposing golf facilities:

- BREC immediately act to repurpose Howell Park GC into a use other than golf.
- Begin planning for the eventual repurposing of JS Clark, with the concept of moving the First Tee elements over to Dumas GC. This will require new investment in Dumas GC, especially in adding a new driving range.
- As golf facilities are repurposed out of golf, the resources (capital and staff) should not be eliminated, but be re-assigned to other BREC golf courses.
- There is a cost to close a Parish golf course, both in terms of direct capital remediation and ongoing maintenance. Parish data provided to NGF indicates the Parish spends over \$1,000 per acre per year on park maintenance, which would become a new expense to BREC for the closed golf course(s), if maintained as a passive park with no revenue (\$135,000 total for Howell Park).
- NGF research into golf course closures like this suggest that about 1/3 of rounds are lost entirely, 1/3 end up at other (non-BREC) area golf courses and 1/3 at other BREC courses.
- The repurposing of one golf course is not likely to reduce BREC's administrative overhead. The BREC overhead on Golf will either: (1) be re-allocated across the remaining golf courses, thus increasing the per-facility overhead charges on the remaining courses; or (2) re-allocated into the Parish's General Fund. The underlying overhead costs will not be reduced.

SYSTEM-WIDE ORGANIZATIONAL RECOMMENDATIONS

The change recommended by NGF should help the Parish: (1) enhance the marketing and promotion of BREC golf facilities; (2) enhance the overall technology capabilities of BREC golf courses; and (3) provide some physical upgrade to individual facilities to keep the product appealing and desirable among golfers. **In addition, the basic oversight and structure of the BREC golf system must change to become more entrepreneurial and run the golf system more like a business and less like a public accommodation.** This means new and improved emphasis on marketing and promotion, especially to markets beyond Baton Rouge. This will mean enhancements to facilities and systems and mean that management will have to react quickly to changes in market characteristics. NGF recommends the Golf Operations Director position function with a more business and marketing approach, as opposed to an on-site management approach or player development coordinator.

BREC Golf Administration and Structure

Other key findings and recommendations regarding BREC Golf Administration include:

- BREC needs to create a formal 20-year master plan for the golf system. The NGF observation is that of a “day-to-day” mentality in operating the golf courses with key decisions made separately and without order or planning. The NGF recommendation is for the system to be organized under a formal plan, identifying the goals for the system and each individual facility.
- The general framework of the NGF recommendation is that each individual BREC Golf facility has its own unique identity, all under a common BREC Golf banner and theme such as “***something for everyone.***”
- The individual course themes and product can be:

BREC Golf System NGF Recommended Individual Golf Facility Placement	
Golf Facility	Theme and Goals
Santa Maria GC	Premier 18-hole championship golf facility focused on local and visitor play, with attraction of larger events and tournaments
Beaver Creek GC	Premier destination-oriented golf facility focused on attracting tourists and corporate outings.
Webb Memorial GC	Lower fee championship golf focused on corporate and business functions/events with active leagues and regular play groups
City Park GC	Standard 9-hole golf course, with lowest fees, for residents and college students
Dumas GC	If remain open, become the lowest fee 18-hole course with focus on leagues and play from intermediate level golfers/ tie-in with First Tee.
Candidates for Repurpose	
Howell Park GC	Repurpose to other non-golf use.
J.S. Clark / First Tee BR	Repurpose to other non-golf use.

PHYSICAL UPGRADE RECOMMENDATIONS

In the previous chapters, the NGF team identified several deficiencies in the physical condition and amenities offered at BREC golf facilities. As most of the NGF review is centered on enhancing activity, revenue and reducing expense, some of the physical improvements are a high overall priority for the system and should not be ignored or postponed for too long. We also note that some of the recommendations are interdependent with each other and thus should be coordinated as part of a master plan (i.e. upgrades at Howell Park or Dumas – course(s) may not remain open).

NGF Physical Improvement Recommendations to All Facilities

In recommending upgrades to the physical plant at BREC golf courses, NGF has divided our suggestions into two categories: (1) specific recommendations that apply to all BREC facilities; and (2) recommendations that are unique to each individual facility.

As indicated on the surveys and from our own observations, course conditions at each facility are in need of significant improvement. While conditions are far better at the two premium courses (Santa Maria and Beaver Creek), these courses are still below where they should be (as their ratings indicate). There are several considerations involved in improving the maintenance conditions of the golf courses. These include:

- **Priority:** Improving course conditions needs to be a priority, not just within the golf division, but also with BREC. This means allocating the resources needed to accomplish the task.
- **Budget:** The maintenance budgets for all the facilities are well below expectation and national averages for their price range. BREC is required to participate in the City Parish employee retirement fund which shows a higher cost for employee related expenses. BREC is paying a lot more for the non-management positions than the public sector, and efficiency may be an issue as well.

BREC Golf System NGF Recommended Maintenance Budget and Staff		
Golf Facility	Recommended Maintenance Budget	Recommended Maintenance Staff
Santa Maria GC	\$550,000	S, AS, M, IT, 4 FT MW + 2-3 PT MW
Beaver Creek GC	\$470,000	S, AS, M, IT, 3 FT MW + 1-2 PT MW
Webb Memorial GC	\$400,000	S, AS, M (SHARE W/ City Park), IT (share w City Park), 4 PT MW
City Park GC	\$215,000	S, M (SHARE W/ Webb), IT (share w Webb), 2 PT MW
Dumas GC	\$400,000	S, AS, M, IT, 4 PT MW
Staff Key – S = superintendent, AS = Assistant Superintendent, M= Mechanic, IT = Irrigation Tech, MW = Maintenance Workers.		

- **Capital Needs:** ALL of the courses suffer from deferred maintenance and capital improvement needs. Some of these are extensive.
- **Equipment:** All the facilities are using equipment that is well past its useful life expectancy. Poor equipment can lead to higher maintenance costs (both maintaining the equipment and problems they cause), and added down time of staff. BREC should develop a comprehensive capital equipment plan to provide adequate and needed equipment at all locations.
- **Expertise:** There is a general lack of credentialed superintendents, and skilled positions such as irrigation specialists, spray techs and mechanics. For example, there is only one irrigation specialist in the entire system and because of the aged system at Santa Maria, that person never leaves that facility.

NGF Priority List of Individual Facility Physical Upgrades

The physical upgrade needs documented by NGF total around \$2.94 to \$3.6 million, although a substantial portion of this is related to direct capital costs required at Howell Park (\$1.2 million) that may not be necessary if BREC considers a repurpose option.

Upgrades by Facility

Below is the NGF recommended list of physical upgrades to be completed at each facility. This list is based on both the greatest immediate need, as well as the ability to generate return on investment. The NGF identified improvements include (all costs presented below are NGF estimates based on previous engagements and should be priced out for exact costs):

1. **Santa Maria GC** – Add new forward tees on 8-10 holes to create a forward tee course of 4,700 yards (est. \$2,500 per tee or 25,000). Improve irrigation piping to improve leaks (\$250,000). Drainage improvement program (TBD – at least \$25,000). Range ball machine (\$15,000). Clubhouse ‘facelift’ of furniture, fixtures, flooring, windows (\$30,000).
2. **Beaver Creek GC** – Add benches, ball washers, water coolers (est. \$5,000). Improve Grill facilities + layout (\$25,000). Add tournament pavilion (\$55,000). Add new forward tees on 6-8 holes to create a forward tee course of 4,700 yards (est. \$2,500 per tee or 20,000). On-course upgrades / sink holes (\$25,000). Range ball machine (\$15,000).
3. **Webb Memorial GC** - Add new forward tees on 6-8 holes to create a forward tee course of 4,700 yards (est. \$20,000). Cover the deck (\$50,000). Add ‘mini-range’/nets (\$15,000). Improve cart shed (\$10,000). Convert Gym/Fitness for banquets (TBD – at least \$150,000).
4. **Dumas GC** (if remain open as golf course – has major needs). Greens replacement (est. \$200,000). New irrigation (\$500,000). Add driving range (\$150,000).
5. **City Park GC** – Convert cart storage into snack bar (est. \$150,000). Replace irrigation pump (\$15,000). Tree trimming (\$15,000).
6. **J.S. Clark / 1st Tee** – (if remain open as golf course) Range improvements/ball machine (est. \$15,000).
7. **Howell Park GC** (if remain open as golf course – has major needs). All turf improvement/replacement (est. \$350,000). New irrigation (\$500,000). Clubhouse / cart storage (\$350,000).

Highest Priority by Item

NGF has divided the upgrade items into several layers of priority, including: (1) priority by facility; (2) highest priority items; (3) investments that should lead directly to increased revenue; and (4) lower priority items. Below is the NGF recommended list of the highest priority items for the full BREC Golf Division in order of NGF recommended priority. This list is based on the above-noted list of facility priorities, as well as the highest priority items in the system. The priority of NGF improvements by project:

1. All actions to improve playability of the courses, including forward tee programs, irrigation efficiency, range equipment and on-course amenities
2. Gym / Fitness conversion to banquet area at Webb GC
3. Add pavilion at Beaver Creek GC
4. Improve clubhouse facilities at Santa Maria

5. Convert the cart storage at City Park to a small snack bar/grill
6. Improve the grill facilities at Beaver Creek
7. Add driving range to Dumas (in lieu of re-do 18th hole)
8. Deck covering at Webb GC
9. All other Howell Park / Dumas upgrades (if Parish elects to retain golf at these sites)

The NGF estimated total expense of these items is as shown below:

BREC Golf System NGF Recommended Upgrades – by Priority		
	Low Estimate	High Estimate
All playability items	\$440,000	\$500,000
Deck Covering at Webb GC	\$45,000	\$60,000
Pavilion at Beaver Creek	\$50,000	\$70,000
Clubhouse upgrade at Santa Maria	\$30,000	\$50,000
Convert cart storage at City Park / snack bar	\$150,000	\$250,000
Improve grill facilities at Beaver Creek	\$25,000	\$30,000
Add driving range to Dumas	\$150,000	\$175,000
Gym/ Fitness conversion at Webb	\$150,000	\$250,000
Total High Priority (excl. Howell + Dumas)	\$1,040,000	\$1,385,000
All other Howell / Dumas Upgrades	\$1,900,000	\$2,200,000
Total	\$2,940,000	\$3,585,000

Capital Program – Recommended Sequencing

The NGF recommendation for sequencing major items can be shown in the chart below:

Schedule by Facility	2014-15	2015	2016	2017	2018
Santa Maria GC	Playability items	Clubhouse			
Beaver Creek	Playability items	Pavilion		Grill upgrade	
Webb Memorial	Playability items	Gym/fitness Conversion			Deck
Dumas	Dr. Range				
City Park	Playability items		Snack bar conversion		
Howell Park	TBD				
JS Clark	TBD				

BASIC OPERATIONAL RECOMMENDATIONS

Additional recommendations regarding basic operations that apply to all BREC Golf facilities include ideas for improving technology capabilities, upgrading the marketing, adjusting fees, improving the golfer experience, food and beverage operations, and other general operating ideas to help stimulate new activity.

Recommendations to Better Employ Technology

Technology is one of the most important tools available to a golf course management team to create incremental revenue, and proper deployment of technology is critical in golf operations in 2014 and beyond. Technology defines and guides the marketing strategy to build a larger customer database, create customer loyalty and boost revenue. There are many opportunities for the BREC Golf Division to improve their use of technology. Our recommendations include:

- Improve POS training for BREC Golf staff to maximize the use of all modules in system, particularly those related to on-line tee times, marketing and customer communications.
- Use the POS system to better integrate the tee sheet into the POS and identify exactly who is playing the golf courses and what they are spending, measuring each customer unique customer and their spending patterns. This is fundamental to segment the database and commence an effective targeted email marketing campaign (this is not being used effectively in the present Golf Division POS).
- Segment the customer databases by facility to determine the age, income, ethnicity, and playing habits of customers as measured by the number of courses played, rounds played per year and dollars spent annually.
- The key to effective marketing is crafting tailored marketing messages. Sending one email to a valued customer thanking them for their loyalty, while sending a different email to those who haven't played in 90 days creates loyalty and repeat purchases.
- The creation of a customer database at the POS terminal is always a challenge. Have a separate kiosk where the golfer can self-register helps expand the database.
- The tee time reservation booking engine on BREC-golf.com is not convenient. The process is not located on the home page in the upper left hand corner. Organizing the web site to facilitate customer transactions will enhance service, encourage greater Internet booking and save pro shop labor in processing reservations.
- Use the BREC Golf website to help build a customer database of 2,000 email address per 18-hole equivalent. There is a great opportunity to expand the current customer file for one to one marketing is far more effective than generic print advertising.
- The social media tools are not automatically integrated into email marketing initiatives. Labor savings and economies of scale can be achieved through using an email delivery tool that automatically integrates to the leading social media forums, i.e. Facebook, twitter, Instagram, etc.
- It is the suggestion of NGF that an email marketing platform be adopted that integrates the customer database with social media platforms. Whether Vertical Response, Constant Contact, or another leading email marketing program be adopted, analyzing the opens, clicks, bounces, and un-subscribes is fundamental to building a successful email program.
- A smartphone application has not been developed nor can golfers receive text alerts broadcast from the email system. The average person checks their cell phone 150 times per day. Having a mobile application facilitates connecting with the customer.

In summary, NGF recommends upgrades to BREC Golf technology with focus on three areas that would greatly aid the Golf system's marketing initiatives to stimulate revenue:

- Customer database segmentation through enhanced reporting.
- Email practices integration with social media emphasizing open, bounce and click through rates.
- Web site remodel to focus dynamic transaction based orientation vs. static page.

Opportunities to Leverage Technology to Boost Revenue

BREC is well behind its peers in many ways with respect to the adoption of technology. From our assessment, NGF has noted the following opportunities to further leverage their use of technology:

Opportunities to Further Leverage Technology	The Benefit
The tee sheet is not interfaced with the POS system.	Identification of who is playing your golf course and what they are spending is to segment the database for effective targeted email marketing.
The tee sheet isn't the primary screen from which all transactions are entered – BREC not capturing who is playing the golf course and their transaction spending.	Using the POS system to merely record a green fee eliminates the opportunity to identify and measure unique customers and their spending patterns.
The customer database is not effectively segmented to determine the age, income, ethnicity, and playing habits of your customers.	Matching the golf experience provided to the demographics of a course's database is important to maximize the revenue potential of each facility.
Registration kiosks are not available at POS terminals to facilitate golfer's registering for targeted emails.	Allowing the golfer to self-register helps expand the database.
The tee time reservation booking engine on the BREC site is provided by a separate 3 rd party and requires extra clicks in order to book.	Organizing the web site to facilitate customer transactions will enhance service, encourage greater Internet booking and save pro shop labor in processing reservations.
The web site does not provide the opportunity for a golfer to register for course newsletters, specials, tournaments or outings.	Building a customer database of 4,000 email address per 18-hole equivalent is the median currently within the golf industry. Even with the Parish's 33,890 email addresses, there is opportunity to expand the current customer file.
The social media tools are not automatically integrated into email marketing initiatives. Therefore, for each message, it is necessary to separately post in duplicate each message to each distribution channel, thus consuming unnecessary labor.	Labor savings and economies of scale can be achieved through using an email delivery tool that automatically integrates to the leading social media forums, i.e., Facebook, twitter, Instagram, etc.
BREC's Golf web site is not effective.	Understanding how golfers are using the web site provides effective feedback to ensure that the site is properly constructed.
A smartphone application has not been developed nor can golfers receive text alerts broadcast from the email system.	The average person checks their cell phone 150 times per day. Having a mobile application facilitates connecting with the customer.

Marketing Recommendations

Few things can positively affect performance more than marketing, and there is often a direct correlation between the amount of money spent on marketing and economic performance. However, in today's competitive and media-rich environment, it may take more than just money to be effective – it also has to be invested wisely. In the past year, BREC has been much more aggressive in its advertising, which is to be commended. Following are some recommendations as to how the marketing can be further improved.

Basic Marketing

In preparing our recommendations for BREC Golf system, NGF sees a two-pronged marketing approach: (1) A system-wide approach that promotes ALL facilities under a unified brand and logo; and (2) an individual facility approach that identifies and promotes each individual facility based on its unique characteristics and offering, along with its own unique brand and logo. The list of NGF recommendations marketing may be short and may even include areas where the Parish is already active.

- **Branding** - The Parish courses fall under BREC Golf Courses, and there has been a logo developed for “BREC Golf.” The logo, if done well, may become marketable in its own right on salable items (clothing, caps, etc.) which will help with merchandise sales. While there is a system brand, each facility should also have its own unique brand, reflected in signage, scorecards and marketing.
- **Theme** - Assuming our recommendation for the position of each golf course, the Parish can promote “a golf facility for everyone,” as there will be a clear progression of facility types from beginner (J.S. Clark, City Park, Dumas) all the way up to professional (Santa Maria) and everything in between. BREC can work to create a strong theme in branding the Parish golf courses as offering “something for everyone.”
- **Strategy** - While the Parish should continue to market the brand of “BREC Golf” (all the Parish courses taken together), we would also encourage developing more facility-specific marketing. This will be essential for Santa Maria and Beaver Creek in particular, as these facilities will be targeting the area’s large tourist/visitor populations.
- **Targeted Marketing:** BREC should also seek to target specific markets, whether with the brand name or by facility. Some examples include:
 - Tourists
 - Large Employers
 - Seniors
 - Women
 - Minorities
 - Juniors
 - Leagues
- **Tournaments/Outings:** Tournaments and outings are exceptional opportunities because they are not only excellent revenue centers, but they also provide a chance to bring golfers to the facility that might not otherwise have played it. We feel the best way to attract tournaments and outings is to be aggressive, rather than sit and wait for the phone to ring. Santa Maria, of course, will likely always be the main venue for tournaments, but we also see a market for the other facilities as well (especially Beaver Creek and Webb GC with some physical improvements). Ideally, BREC would hire a commissioned sales person to market tournaments and outings for all the facilities. However, BREC also needs to promote greater cooperation among facilities. It is our understanding, through interviews, that if a caller calls one facility about a tournament and that facility is unable to meet their needs, that is the end of it. What should happen is that the facility manager should suggest another of the BREC courses as an alternative and go so far as to provide the contact information to the facility and contact that facility’s manager and give them the tournament contact information.

Website Marketing

In today's world, the web is where golfers first turn when looking for a place to play, and this is especially true for visitors to the area. NGF has observed that the current website is substandard for the industry. First, a golfer cannot get to the golf website (www.golf.brec.org) from the main BREC website. And the discussion of golf on the main website is limited. There needs to be a link from the main website to the golf website.

Moreover, the websites for each course is poor. Because they put what is essentially a newsletter on the main page, one has to scroll quite a bit to get to the useful information. Nor is there enough information provided.

NGF Recommendations for BREC golf website(s) include:

- Each course should have its own domain name along with its own website. (E.g. www.santamariagolf.com)
- On the main website, there should be more descriptive information about each course, including price ranges, back yardages, etc. so people unfamiliar with the courses would have a better idea as to which one is best suited for them.
- Each individual course website should have (some items already in place):
 - On line tee time reservations
 - Course Layout
 - Scorecard
 - Lots of Pictures (making sure they feature a diverse market)
 - Fees, including any current specials
 - Email signup
 - Merchandise sales
 - Newsletter
 - Tournament/outing information, including information about upcoming tournaments with contact and fee information for those tournaments that are open for outside play
 - League information
 - Map with directions
 - Current weather conditions

Other Marketing Recommendations

The overall BREC marketing strategy should include (some items already in place):

- **Email Marketing:** Email marketing is perhaps the most cost-effective way of reaching current customers. BREC should aggressively seek to expand its email database, with special promotions sent out only via email. (Note: the online tee time reservation system will be a huge asset in this as customers will need to provide an email address when they book their tee time). Emails should be sent out that for both brand-wide and facility specific. The goal should be to have a minimum of three email contacts with each person in the database per month.
- **Social Networking:** Social networking is the fastest growing marketing tool in golf. Initially, focus on Facebook and twitter, but you should expand to other social media over time.
- **You Tube:** You Tube is the second most utilized search engine on the internet. Each course should have a presence, including a video of the course. We would also

encourage instruction videos, informational videos, even videos of tournaments (with permission given).

- **Internet specialist:** Because of the importance of the internet to your marketing, consider hiring an internet specialist. This person would be responsible for keeping the websites up-to-date and overseeing the Social network and email programs. This could be a part-time position.
- **Print Media:** Print media is not dead. It is still a good way to reach your customer base, especially with seniors. While this should NOT be the focus of your media campaign, we would encourage spot ads in the local paper and image ads in regional golf publications.
- **Brochure:** BREC does have an excellent brochure for the Golf Division (“Golf BREC”). The main suggestions for it would be to find a more appealing cover photo (consider using a professional photographer), putting Santa Maria first in the course description pages, and discussing price to a point (you do not want to give exact prices, but perhaps use \$ signs as an indicator, with Santa Maria having three, etc.). We also strongly recommend developing individual course brochures for Santa Maria and Beaver Creek. (Webb and City Park would be two other candidates).
- **Billboard:** BREC is utilizing billboards, which we feel is a good idea. However, the copy needs work. We recommend rotating ads. Some should build on the overall brand, while others would focus on a specific facility.
- **Community:** We recommend having the head professionals and/or golf managers to call on area business, churches and organizations to promote the course, solicit group clinics, and generate community awareness. The golf system, either as a whole or specific facilities, should be active in the Chamber of Commerce and other area civic organizations.
- **Public Relations/Grand Re-opening:** PR announcements are free and can be effective. Make sure to send out press releases, particularly on details related to the proposed upgrades/renovations and as each newly renovated facility hosts its “grand reopening.” This is highly cost effective, as most media will allow free publication of public notices. We know that the area press has published several articles on the golf operation. As improvements are made, the reporter(s) should be invited back to see what has changed.

Tracking Ads - Savvy marketers realize it is important to constantly monitor the effectiveness of their marketing campaigns to identify which campaigns are actually working and allow for appropriate adjustments. Redemption ads (coupons) are always easy to track. Internet ads that require a “click” that can be monitored are also easy to track. More difficult are general ads, such as billboards or print ads, which do not provide a discount or other easily trackable item. There are still ways of tracking effectiveness. These include:

- **Tracking Play** - The bottom line is how much impact the ads have to the bottom line. Simply tracking play before and after an ad is run and comparing to similar time periods, can give you a good idea. Of course there are always confounding elements (such as weather), so ideally this is repeated.
- **Phone Number** - The cost of phones has dropped and the digital age has made it easier to track calls. A sure way of tracking an ads effectiveness is to give it a unique phone number (or website address, etc.) where the responses can be easily monitored.

Signage. The signage for some of BREC Golf courses should be improved, to the extent that is allowable by Parish and local guidelines. It is recommended that any signage to BREC Golf sites include the facility logos (as opposed to BREC logo) and make locations of each golf course as clear as possible and note that each golf course is “open to the public.”

Recommended Fee Structure

NGF has reviewed the existing fee structure at BREC Golf courses, as well as a review of competing facilities in each market. The review shows there is some room to adjust fees on several levels, including:

- Creating segmentation between the Parish golf facilities, rather than have “one-size-fits-all” approach; and
- Improving yield management – increasing fees at peak demand times and decreasing fees when demand is reduced.

For the most part, the current fees are consistent with the course conditions. As conditions improve, a fee increase may be possible. However, we would recommend that future fee increases be incremental rather than dramatic in nature. That being said, there are a number of logical inconsistencies with the current rate schedule. These include:

- Premium course (Beaver Creek) priced less than the standard courses (during the week)
- 9 hole rates are less than half 18 hole rates (Santa Maria and Beaver Creek)
- Age for seniors on senior special different than for the regular senior rate (50 vs 55)
- Having the senior rate begin at age 55, when that is usually the age when people have the greatest amount of disposable income and are at peak earning power. NGF recommends gradually increasing the age limit for senior discounts to at least age 60. By gradually, we mean raise it one year each year until achieving the goal. In this way, anyone currently getting the discount would retain it.
- Having the same cart fee for an executive course as a premium 18-hole course.

In addition to correcting these inconsistencies, we feel there are some opportunities to increase yields at some of the facilities, while encouraging more play through strategic rate reductions at others.

Below are our recommendations for rate changes based on current course conditions. Again, as course conditions improve consistently, there may be an opportunity to further increase fees.

Recommended Daily Green Fees

	Santa Maria		Beaver Creek		Webb		Dumas	
	Current	Recomm	Current	Recomm	Current	Recomm	Current	Recomm
Green Fees								
Weekday								
9 Hole	\$15.00	\$18.00	\$15.00	\$14.00	\$8.00	\$8.00	\$7.00	\$7.00
18 Hole	\$28.00	\$30.00	\$25.00	\$25.00	\$15.00	\$15.00	\$12.00	\$12.00
Senior	\$22.00	\$23.00	\$8.00	\$20.00	\$13.00	\$13.00	\$9.00	\$9.00
Junior	\$22.00	\$23.00	\$15.00	\$20.00	\$13.00	\$13.00	\$9.00	\$9.00
Twilight	\$22.00	\$23.00	\$15.00	\$20.00	\$13.00	\$13.00	\$9.00	\$9.00
Super TL (4:00 PM)		\$16.00		\$14.00				\$8.00
Weekend								
9 Hole	\$18.00	\$24.00	\$18.00	\$17.00	\$10.00	\$11.00	\$8.00	\$8.00
18 Hole	\$38.00	\$40.00	\$38.00	\$36.00	\$18.00	\$19.00	\$14.00	\$14.00
Senior	\$30.00	\$32.00	\$30.00	\$29.00	\$16.00	\$16.50	\$12.00	\$12.00
Junior	\$30.00	\$32.00	\$30.00	\$29.00	\$16.00	\$16.50	\$12.00	\$12.00
Twilight	\$30.00	\$32.00	\$30.00	\$29.00	\$16.00	\$16.50	\$12.00	\$12.00
Super TL (4:00 PM)		\$25.00		\$18.00		\$12.00		\$9.00
Cart Fees								
9 Hole	\$6.00	\$8.00	\$6.00	\$7.00	\$6.00	\$6.50	\$6.00	\$6.50
18 Hole	\$12.00	\$15.00	\$12.00	\$13.00	\$12.00	\$12.00	\$12.00	\$12.00

	City Park		Clark		Howell	
	Current	Recomm	Current	Recomm	Current	Recomm
Green Fees						
Weekday						
9 Hole	\$6.00	xxx	\$6.00	xxx	\$6.00	\$6.00
18 Hole	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Senior	\$8.00	\$8.00	\$8.00	\$8.00	\$7.50	\$8.00
Junior	\$8.00	\$8.00	\$8.00	\$8.00	\$7.50	\$8.00
Twilight	\$8.00	\$8.00	\$8.00	\$8.00	\$7.50	\$8.00
Super TL (4:00 PM)		\$6.00		\$6.00		\$6.00
Weekend						
9 Hole	\$7.00	xxx	\$7.00	xxx	\$7.00	\$7.00
18 Hole	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00	\$12.00
Senior	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Junior	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Twilight	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Super TL (4:00 PM)		\$7.00		\$7.00		\$7.00
Cart Fees						
9 Hole	\$6.00	\$5.00	\$6.00	\$5.00	\$6.00	\$6.00
18 Hole	\$12.00	\$11.00	\$12.00	\$11.00	\$12.00	\$12.00

Recommended Annual Pass Fees

Below are the recommended rates for each plan. However, we recommend doing the price increases in phases over a couple of years. It does offer the possibility of offering an incentive if purchased in advance.

Passes	Current	Recommended
7 Course Plans		
Monday- Thursday		
Individual	\$1,450	\$1,100
Family	\$2,175	\$1,600
Senior	\$1,000	\$850
Senior Couple	\$1,500	\$1,250
Cart Plan	\$625	\$500
7 Day		
Individual	\$1,700	\$1,400
Family	\$2,500	\$2,100
Senior	\$1,350	\$1,150
Senior Couple	\$2,025	\$1,700
Cart Plan	\$625	\$625
5 Course Plans		
Monday- Thursday		
Individual	\$450	\$550
Family	\$650	\$825
Senior	\$350	\$500
Senior Couple	\$500	\$725
Cart Plan	\$625	\$550
7 Day		
Individual	\$550	\$700
Family	\$750	\$1,100
Senior	\$450	\$600
Senior Couple	\$600	\$900
Cart Plan	\$625	\$700

Another issue is payment options. Requiring golfers to come up with a lump sum payment can be challenging. However, shorter-term plans should be discouraged as they typically reduce overall revenue. The solution is to offer a monthly payment plan. The monthly payment would be equal to 1/10th of the annual amount, so the individual would be paying 20% more than under the single pay option. We would also have the following restrictions:

- **Credit Card:** They should only be offered where a credit card can be automatically charged at the beginning of each month.
- **Cancellation:** If the person cancels the plan before the end of the year, they would NOT be allowed to purchase another plan for at least six months. This will discourage people from only getting a pass for the “golf season,” which would result in lower overall revenue.

Recommendations for Improving Customer Experience

There are two main components to customer service: (1) having employees dedicated to providing great service; and (2) providing a platform for those services – in other words, providing extra services to the customer. There appears to be room for improvement in both areas with BREC, but especially in the services being offered.

Attitude

The importance of the staff having a customer-service oriented attitude cannot be minimized. Every employee must be committed to providing outstanding customer service and dedicated to giving the customer the best golfing experience possible. Staff cannot control the flight of the ball, but they can have an impact on almost everything else the golfer experiences while being a guest at your facilities. This commitment is demonstrated in a number of ways:

- **Friendly atmosphere:** ALL customers will be greeted with a smile and with a helpful, friendly attitude by staff. Counter and professional staff will work hard to remember customer's names.
- **"Magic Moment" mentality:** A Magic Moment is an experience that the customer will remember positively for long after the rest of the day's activities. A golfer who experiences a "magic moment" – a moment that is both memorable and pleasant – is not only likely to return, but to tell all their friends and family about it. The opportunity to create a "magic moment" can occur at any time and may have nothing to do with the golfer's game. It may be a customer service rep who takes the extra time to help the golfer find and retrieve a "lost" ball, or flipping him a replacement. It may be a server who goes out of her way to satisfy a customer's special request, or it may be a PGA pro giving a free tip on the range when the golfer is practicing--but it only happens when you have a staff that is committed to finding them.
- **Customer Appreciation:** Staff should understand that the customer is their paycheck and that they need to work hard to earn that customer's loyalty.
- **Good manners:** Just saying "please" and "thank you" is very important. But good manners is also seen in answering the phone by the third ring, but letting the customer at the counter know he will not be ignored ("excuse me for a moment" then putting the phone call on hold for a short time.).
- **Every Employee:** The commitment to customer service is not limited to the staff that interacts regularly with the customers, but should be seen throughout the staff. It is seen in how meticulously you keep the restrooms and the entire facility clean and inviting. It is seen in courtesy from all staff, such as maintenance workers stopping when a golfer is ready to hit. It is seen in the pride that every staff member should take in his or her work.

Services

Customer service is also seen by the services offered. Of course, the level of services should vary with the price point of the product. Nevertheless, at every level, the goal is to exceed customer expectations. Some examples of the added service are:

- **On line reservations:** Offering online tee time reservations will have a dramatic effect on customer service and satisfaction. Not only will it make it a lot easier for most of the golfers to book tee times, but it can also improve the customer service of the customer at the counter as the staff members is not constantly having to answer the phone. Or just as annoying, letting the phone continue to ring.

- **Starters:** Starters should be at every facility on busy days and at the “premium” facilities on a daily basis. Golfers do remember starters – both good and bad. Surly starters can easily make a golfer not want to return. On the other hand, a friendly, helpful starter creates a positive feeling that a golfer takes with them to the first tee. This can often translate to a better game as they are not filled with anger over poor treatment. Starters can also help pace of play by guiding golfers to the best tee for their game, without being condescending or unpleasant. They can provide important information, especially to golfers who are not familiar with the course. But even those that are, the starter can tell them whether or not there is beverage cart service that day, etc. Three keys to enhancing starter service are:
 - **Right People:** Hiring the right people for the position is obviously critical. They need to be both reliable and have a friendly, outgoing personality.
 - **Training:** Providing the right training is also important. They need to not only be taught the duties of the position, but also in how to provide better customer service.
 - **Supervision:** There needs to be regular supervision of the starter staff, including getting customer feedback.
- **Customer Service Reps (Rangers/Marshals):** Course rangers go by many names, depending on the organization. Some places call them “rangers” others, “marshals”. Some call them “customer service reps” to remove the negative stigma of enforcing rules and pace, and emphasize the positive of customer service. Not only should rangers be thoroughly trained in how to do control access to the course and promote faster play, but to do so in a friendly and engaging manner. They should greet golfers with a smile and acknowledgement as they patrol and ask if they can be of service. Further, they can be taught to look for “magic moments” such as helping the golfer find lost balls, or giving them a replacement. Rangers should be employed at ALL the facilities during anticipated busy times and at the “premium” facilities at all times. The same three keys to improving starter services also applies to rangers.
- **Beverage Cart Service:** We view beverage cart service as much more than a profit center. It is also an important customer service. Customers enjoy being waited on, especially if the attendant is attentive and friendly. Santa Maria and Beaver Creek should have beverage cart service seven days a week. The other courses should offer the service on weekends and known busy days. Beverage cart attendants should be trained to be friendly and helpful as well as respectful.

Recommendations for Increasing Rounds Activity

There are only three areas from which increased rounds activity can come:

1. Increasing rounds from current customers
2. Taking away customers from other facilities
3. Creating new golfers (customers)

While we anticipate increasing play from all three markets, it is the third area, “creating new customers” where BREC can really stand out against the competition.

Increasing Play from Current Customers

This often comes under the banner “customer loyalty programs”, but that implies only putting in an effort to keep your customers loyal to your facility rather than increasing the number of times they actually play. The truth is that the BREC golf courses DOMINATE the local public golf market. As a result, BREC has to be careful that any “loyalty” program does not simply turn into

a “revenue-reducing plan” as they simply make golf cheaper for the golfers who already play a lot at BREC courses.

Naturally, if it appears that the courses are in danger of losing market share, it would be prudent to implement a loyalty program. The NGF favors the programs that use awards points for ALL purchases and is tracked by the POS system. However, at this point in time, we feel it may be counter-productive to implement such a program simply to increase play among frequent customers since we see it as more likely to reduce revenue as the risk of losing their play is far less than in other markets. Instead, we see using such programs to build revenue in other areas such as food and beverage and merchandise sales.

NGF’s recommendation for the best way to increase play among current customer is simple: Provide them with a better product and a better golf experience. This can be done through improved course maintenance and customer service, and in addressing the other concerns that were raised from the course survey.

Taking Customers from Other Golf Facilities

This is the area where many cry “foul” because a government-owned entity is taking away business (revenue) from privately owned businesses. The alternative viewpoint is that a municipality can improve the golf experience for ALL golfers by raising the “bar” or the “standards” that the competition must meet to retain customers. Taking other company’s business is NOT necessarily the intent, but rather may be a result of good business practices that begin with elevating the quality of the playing experience for the customer.

NGF states that the best way to increase market share comes from improvements to the golf experience at every facility, as well as better marketing. We feel BREC should intend to be the value leader in the market by offering a superior golfing experience at a fair price.

Creating New Markets

The NGF team sees a tremendous opportunity to increase play by creating “new” customers or new markets. There are two ways BREC can do this:

1. **Tourists/Visitors/Business Travelers:** These golfers are traveling through the area, but are not currently playing golf while here. This is generally because area courses are not making an effort to penetrate this very lucrative market. It is lucrative not only in terms of potential volume, but because golfers, when they travel, are not price-sensitive but are mostly interested in having a wonderful golfing experience.
2. **New Golfers:** This is the area where we feel BREC courses can make the single biggest contribution to the Baton Rouge market and where we feel this system is far ahead of the competition.

Tourists/Visitors - Tourists are an attractive target in the golf industry because they tend to have less price sensitivity than local golfers. They not only will pay much higher playing fees, but also spend more on merchandise and food and beverage. This is because these golfers tend to seek out a “memorable experience” rather than the cheapest course. Thus, they tend to seek out the more expensive courses as these are most likely to provide such an experience.

There is no question that the area sees a lot of visitors. With the State Government, LSU, the casinos, the USS Kidd, and others, there are many attractions and reasons for visitors to come to Baton Rouge. As a rule of thumb, BREC should expect that about 1 in every 10 visitors are likely to be golfers. The question is how to best attract them.

Currently, BREC has two facilities that would be considered attractive to tourists: Santa Maria and Beaver Creek. City Park also has some potential due to its historic nature and unique topography for the area. However, based on our interviews with staff, these courses are not getting a lot of play from visitors currently.

The most important way is to increase the awareness of these courses to travelers, and this is best done by strategic marketing. These efforts should include:

- Dramatically improving the internet presence, especially the web pages.
- Using the billboards to promote specific courses, especially Santa Maria (the ads can rotate between specific courses and general ads).
- Contacting all the area hotels
- Developing and distributing brochures to ALL area tourist racks, including all hotels, and rest areas on the interstates, and the local Chamber of Commerce, and the Visitors Bureau. Santa Maria and Beaver Creek should have their own brochure in addition to a redesigned system brochure.
- Creating a golf package with select area hotels (The most recent golf manager started this program, which needs to be extended).
- Putting advertising in each room at select hotels
- Maintaining a strong relationship with area hotel concierges

New Golfers - BREC has historically done a great job in developing new golfers through their junior programs, especially First Tee. In addition, several new programs were recently developed, although to our understanding, never implemented.

One issue is the lack of PGA professionals within the BREC organization. The backbone of development programs is typically group clinics, many of which are free to better entice a targeted group. Contract PGA professionals are reluctant to do this as it takes away from their known lucrative lesson business. That is why it is best done with in-house staff. The problem is that BREC simply does not have enough qualified personnel to develop and implement these programs system wide or even at any facility outside of Clark.

Junior Programs

BREC has some wonderful Junior programs already in place, especially with First Tee. Yet, there is little in junior programming being done at non First Tee facilities, mostly due to lack of qualified personnel and practice facilities.

The NGF recommends having on staff Class-A PGA professionals at each facility that has a driving range (Beaver Creek, Santa Maria and JS Clark, but possibly Dumas in the near future). Even those facilities lacking a PGA Professional may be able to host junior camps in the summer and have special clinics throughout the year to attract new juniors. In addition, we recommend:

- Expand the age range to include younger children
- Create additional year-round programs, with clinics and camps during school breaks.
- Work closely with area schools to develop more and better golf programming
- Add “Junior” or “Family” tees at each facility according to USGA guidelines
- Add “Family Fees” where one junior can play free with a full-fee paying adult. (Times will be restricted to slower play periods).

Unfortunately, there are two common problems with most junior programming. Most junior programs at golf facilities target the children of golfers – especially their own clients. While this is certainly important, it does little to expand the market. On the other hand, programs such as First Tee, that target children of non-golfers, do virtually nothing to get the parents involved in golf. Children of golfers are an easy target. We simply need to make the junior programming known to them and make it affordable, of great quality, and convenient to both the parents and the children. Getting children of non-golfers is a much more difficult task. These children are largely unexposed to the game. Further, many of them have developed a negative outlook on golf -- perpetuated by the media -- as an “elitist” sport with rigid rules, dress codes, and not much fun. Our recommended strategy is three-fold:

- Increase awareness through marketing and programming with area schools.
- Change Perceptions
- Involve the Family

The biggest missing element in junior programs today is that they fail to truly involve the parents. Yet the parents are critical to future participation in golf in terms of both supplying the means and maintaining the enthusiasm. In addition, the parents represent the biggest potential for current income.

Recommendations for Increased Participation from Less-Traditional Segments

Increasing participation among less traditional golfer populations is generally about two groups - women and minorities. We know that 50% of the population is female. We also know that over 50% of the Parish’s population is considered minority. Further, the minority population is growing at a much faster rate. The issue is particularly important to BREC, as several of its facilities are located in proximity to minority neighborhoods.

Understanding Obstacles

To increase participation, one must first understand more about the obstacles that need to be overcome. These include:

- **Perception of Golf:** Golf is often perceived as “elitist,” especially among minorities. Young people rarely associate it with being “cool” or “fun.” It is also perceived as being very expensive and difficult, with some justification.
- **Staff attitudes:** Women and minorities are often made to feel unwelcome and are treated differently than white male customers. We do not know the extent to which this is an issue with BREC courses.
- **Other Golfer Attitudes:** Many other golfers react negatively to women and minorities. Male golfers can often be heard complaining about having to follow “a bunch of women.”
- **Lack of Peers:** Golf is a social activity. If a person is not able to identify with others that are playing, it is difficult to entice that person to play.
- **Affordability:** Many minorities tend to have less disposable income, making cost an objection.

For women, there are often other barriers to playing, including:

- **Playability:** Most courses are proportionately much longer for women than men. Women tend to hit the ball about 70% as far as men. Therefore, the preferred distance for male golfers, which is about 6,300 yards, is equivalent to about 4,500 for women. Yet most courses are over 5,000 yards from the forward tees. Only Howell Park and Dumas have yardages that meet the threshold. Below is a review of the most forward tee placements at BREC 18-hole courses:

Golf Facility	Yardage from Most Forward Tee
Santa Maria GC	5,153 Yards
Dumas GC	4,650 Yards
Webb Memorial GC	5,203 Yards
Howell Park GC	4,442 Yards
Beaver Creek GC	4,955 Yards

- **Family:** Women tend to be the main caregivers for the family. Even on weekends, when the men go out to play golf, the women feel they have to stay home to watch the kids.

Recommendations for Increasing Activity from Less Traditional Segments

So how does BREC overcome these obstacles and significantly increase the participation among women and minorities? The successful strategy involves making changes both internally (facility) and externally (marketing and programming).

Internal Changes

- **Attitudes:** Attitude changes starts at the top, which is why it is so important to have a management company who is committed to bringing golf to more women and minorities. Make sure that everyone who walks into our doors is treated as a golfer and nothing else. EVERYONE should be greeted with a smile and a helpful, friendly attitude.
- **Staffing:** Where possible, infuse staff with more women and minorities (we note BREC already does well at this). It is so much more comforting for prospective players if they see people at the course, particularly those that interact with the golfers, similar to themselves.
- **Environment:** Women and minorities are often given the message of not being welcome in ways most operators fail to appreciate. Two examples are merchandise and food & beverage.
 - **Merchandise:** For women, it is very important to have a large selection of merchandise to choose from. When I talk to operators about adding more ladies apparel and merchandise, the answer I am almost always given is that “it won’t sell.” Well, it will not sell because they do not stock it. Further, lack of merchandise discourages women from play, so if the sales are lacking the bigger gain is in more participation. (This mostly applies at Santa Maria, which currently is the only clubhouse that has a good sized pro shop).
 - **Food and beverage:** Again, for women, it is important to have alternate menu choices such as more salads, wraps, fruit and other healthy additions.
- **Affordability:** Golf is more expensive than many activities. However, there are many strategies that have been developed to lower the on-going cost of playing (e.g. Twilight times, coupons, specials, etc.). Yet, little attention is given to a major “hidden” objection that is present for non-golfers: the high cost of taking up the sport.

This cost includes lessons, equipment and apparel (especially shoes). Here are some strategies available to lower this cost:

- **Low cost rentals:** Providing “budget” rentals for nominal fees. These would be largely used clubs and bags that have little investment in them. These would be in addition to the regular club rentals. (At Santa Maria and Beaver Creek, there need to be Premium rentals from popular labels such as Nike or Calloway to attract more visitor play).
- **Affordable Clinics:** Offering a multitude of affordable (and some free) clinics for beginners. Some should be targeted to specific groups, while others are open for everyone.
- **Bundles:** Creating beginner bundles that include clinics, private lessons, range use, green and cart fees, and significant equipment discounts, that are affordable.

Facility Changes:

- **Forward Tees:** New forward tees should be built at Santa Maria, Beaver Creek and Webb, with a yardage goal of around 4,500 yards.
- **Merchandise:** Dramatically increasing the amount of women’s merchandise at Santa Maria and wherever else men’s clothing is being sold.
- **Food & Beverage:** Adding more healthy choices and select ethnic items to the menus.
- **More “fun”:** Encourage a more fun atmosphere at all the facilities, but especially those that will be targeting beginners and juniors (e.g. Clark, City Park), including a relaxed dress code. Emphasize those aspects of golf that make it special, such as the honor system and code of ethics, but relax those barriers that make it seem “stiff”.
- **Range Targets:** On the ranges especially at Clark, consider creating target greens. Around each green create at least two “rings” made by either different mowing heights or dye. This will create a “target” effect and lead to games that can be played during clinics to make the game more “fun” – creating a scoring system similar to darts.

External Changes (marketing and programming)

- **Advertising:** Make sure that pictures of the courses in advertising reflect a diverse marketplace. When targeting a specific group, place ads in media that target the same demographics.
- **Community Outreach:** Work on being aggressive in going OUT into the community; visiting churches, minority-owned businesses, civic groups and organizations. (Note: this will require either a staffer that is dedicated to doing this, or freeing up time for the course managers to do so). We recommend offering special clinics and even tournaments or sponsorships.
- **Targeted Clinics:** Offer numerous affordable or free clinics targeted to specific groups, e.g. created for a small group or organization such as a business, church or organization. Others may be more general, such as an “executive women’s clinic” designed for business women.
- **Staff Involvement:** Encourage ALL staff to learn golf and give them incentives to do so. Make it easier for them to bring friends and family to the game by providing free clinics, low-cost equipment and other incentives. Not only will this help spread golf within the community, but it should improve the quality of the service and maintenance and help workers take greater pride to their job.

- **Family Effort:** Work to bring golf to families. Consider offering family clinics and rates at least as some of the courses. This is not only important to attract more women, but many minorities are very family oriented and this will make the game more enjoyable for them.

Recommendations for Improving League Activity

Leagues are becoming more popular throughout the US. In northern states, league play can often account for more than half of the overall play. However, most operators take a passive approach to league play. If someone comes to them and wants to have a league, they will cooperate.

However, leagues are a great way to build business and make golf more “fun.” These are great social networking opportunities for people. By emphasizing the “fun” leagues become more attractive to new golfers as well as established golfers.

We would encourage forming new facility-generated leagues at EACH facility (e.g. Santa Maria League or Webb League). Look to both large employers and organizations to establish their own leagues as well as create your own. Most leagues will be 9-hole. To make some of the leagues more attractive, try to take an “inclusive” approach where one fee covers the green fee, cart fee, prize money, and two beverages or a sandwich (hamburger/hotdog/wrap) and a beverage. Include in the league choices will be at least one couples league on Friday nights at one or more of the facilities.

General Food and Beverage Recommendations

The NGF sees a significant opportunity to dramatically increase food and beverage revenue at BREC courses by expanding both the menu and the service. Many of these improvements were noted in our physical plant upgrades, but some are service oriented as well.

Snack Bar

Maximizing the opportunity for snack bar sales will require some capital improvements, particularly adding improved grill operations at Webb Memorial and City Park. Both operations would then have alcohol sales.

Maximizing potential will also involve creating a more inviting environment to entice golfers to stay longer and eat and drink more. We will encourage the purchase of new furniture and multiple large-screen TVs towards this end, especially at Santa Maria.

The grill operations at the two Premium courses, Santa Maria and Beaver Creek need to be upgraded to be more consistent with other similarly priced operations. Currently both are no more than snack bars, with limited service and menu options. The menus need to be upgraded and customer also needs to be improved at both locations.

Beverage Cart

At the time of our initial site visit, none of the seven course offered beverage cart service except for tournaments and outings, and even then only upon request. Beverage cart service can be highly profitable. We typically see beverage cart service (when beer sales are allowed) as generating between \$2 and \$3 per round, and often more at premium facilities. Thus, adding beverage cart service at Santa Maria should produce an additional \$100,000 or so in revenue, and \$45,000 to \$50,000 more at Beaver Creek. At Webb, the revenue per round may not be as good, but the volume would be higher so it should also produce \$50,000 or more in revenue.

We feel beverage cart service should be seven days a week at Santa Maria and at Beaver Creek. This is because the beverage cart is more than just a profit center, it is an important customer service. As such, it enhances the golf experience for the golfer, which, in turn, makes them want to return. We would also have the beverage cart running daily at Webb, although would be more willing to reduce its service during slow periods there.

Banquets and Outings

As the grill operations at Santa Maria improve, so will the opportunities of doing outside events, such as banquets, weddings and outings. These can be highly profitable events.

If the grill area at Beaver Creek can be modified as recommended by NGF, it would also make for an excellent location for outside events. City Park, while lacking in amenities, has great aesthetic appeal. A new grill operation also opens the potential for banquets at Webb. Because of its central location, we see a higher demand for corporate events than for weddings.

General Merchandise Recommendations

The sale of merchandise in pro shops is an area where dramatic improvement is possible at BREC courses. As mentioned previously, **one of the biggest issues is simply inventory**. The facilities are greatly limited in how much inventory they can buy and even more restricted in replacing inventory that has been sold. This results in empty shelves that are not producing revenue, but also presents a depressing image to the customer. This poor initial impression of the facility leads to a low expectation for the golf course, which can be difficult to overcome.

Another area to consider is the lack of sales space. Only Santa Maria has an acceptable display area for merchandise. Most of the other facilities have very limited areas for merchandise sales. This obviously greatly limits what they can sell. As a result, most of the facilities carry only bare essentials such as balls, tees, gloves, etc.

Selection is also not ideal. This is obviously correlated with the two previous issues. With limited display area and limited ability to buy inventory, there necessarily will be a limit to the selection of goods available. So instead of stocking ten to fifteen different types of balls, for example, the pro shop may only carry three to six. As golfers tend to be highly loyal to their golf ball brand, the restriction on selection has a drastic effect on sales.

Other Ideas to Help Improve Merchandise Sales

- **Appropriate Merchandise** - Santa Maria had a shirt selection that was more appropriate for a low-end course. At the time of our inspection, there were a very limited number of logoed shirts, yet these tend to be the shirts that sell the most at other pro shops. After all, it is the logo that makes the shirt selection at the course unique. Golfers can get non-logoed shirts a lot cheaper at Walmart, etc. so why would they buy at the golf course?
- **Sales, Sales, Sales:** Most operators only put “old” merchandise on sale. However, savvy retailers know that shoppers are fixated on “sales”. We will always have some prime items on sale in every category (e.g. shirts, balls, equipment, etc.). Some sales will be oriented around a manufacturer (e.g. all Nike goods on sale), while others will be more random.
- **Promote:** There is an adage that goes “a promotion not promoted is not much of a promotion.” BREC should always show what merchandise sales are going on, and have flyers throughout the clubhouse and notices on the carts. Sales will be featured in advertising, including some merchandise only sales ads in area papers. Notice of sales will also be sent out to the email database.

Driving Range Recommendations

Unfortunately, only three of the facilities have driving ranges. Nevertheless, one can still maximize the opportunity. Two of the biggest changes we recommend:

- **Self-service:** We suggest BREC make the ranges as convenient as possible. We recommend placing self-service electronic ball dispensers at each range (estimated cost = \$10,000 per machine). These will NOT be set up to take tokens or cash. However, they will take electronic keys that customers can buy with prepaid amounts, with discounts given for larger amounts. (e.g. \$120 worth of balls for \$100). This will encourage more use.
- **Targets:** We want to make the range “fun”. Therefore, in addition to creating target greens, we will create “rings” around the greens to give them more of a “target” look. This will allow instructors (and individuals) to create fun games by scoring one point for the outer ring, two for the inner and five for hitting the green.

Other Operational Recommendations

Pace of Play Recommendations

Pace of play is the single biggest complaint from golf customers nationwide. Below are some corrective measures the Parish can take to reduce significantly the pace of play:

- **New Forward Tees** - creating shorter golf courses and promoting the “tee it forward” initiatives should help to get golfers to play from the most appropriate tee position.
- **Add Marshals** - We recommend utilizing marshals on busier days at most courses.
- **Course Maintenance** - We recommend that the rough be kept at no longer than 2 inches in length and that the areas under trees be kept as clear as possible. Better overall maintenance will help with the pace as well as overall customer satisfaction. At the highest volume courses, if pace continues to be a big problem, consider shortening the rough even more.
- **Monitor** - We recommend that the pace of play be consistently monitored and recorded. Look for patterns when it slows down to see if other adjustments may be required.

Third-Party Wholesale

The BREC golf courses could consider a license of the EZ Links software through a barter system. Under this plan, BREC would provide the third party vendor tee times daily to liquidate at whatever price they deem appropriate to generate revenue to provide for their compensation.

There is no greater issue in the golf industry than the impact of barter trade creating customer disintermediation. Though moving unsold inventory through wholesalers / discounters can be a very useful tool (and can result in increased awareness of a facility), NGF does not recommend that it become a substitute for vigilant internal tee sheet / yield management. NGF has witnessed instances where golf course management seemingly cedes too much control of its tee sheet management to on-line wholesalers. While EZ Links is asking for additional tee times and consideration for the continued license of the software, and while the typical software vendor liquidates \$26,500 in bartered tee times annual for access to their software representing a potential liquidated trade value of \$225,250 for the continued access to EZ Link's software. NGF has included the National Golf Course Owner's Association's (NGCOA) recommendations for managing third-party wholesalers in **Appendix B** to this report.

Preliminary Golf Action Plan (2014-2018)

As part of this NGF Consulting study effort, the consultants have prepared a preliminary plan of action for key items as recommended by NGF. The plan includes identification of key items for action over the next three years, or through the end of 2017. The economic evaluation related to these action items are shown in the previous section on recommendations (for physical upgrade items) and in the economic estimates in the next section.

KEY ACTION ITEMS FOR 2014-2015

The NGF recommended key action items for the remainder of 2014 and in to 2015 includes action steps mostly related to BREC system future planning. The key actions steps for 2014 and 2015 include:

- **Master Plan** - Create master plan for BREC Golf to include the desired number of golf facilities, a plan for basic operations (continue with self-operation of outside management) and the level of capital investment / subsidy that BREC is willing to commit to the golf operations.
- **Re-Purpose Planning** – Begin to plan for golf courses recommended NGF to be re-purposed for another (non-golf) use. The NGF recommended that Howell Park be the first candidate for repurposing, followed by J.S. Clark. The NGF recommended five total golf facilities in BREC, including a *First Tee* facility.
- **Operational Enhancements** – It is clear that BREC needs to improve the basic operation of golf facilities. Key items calling for action in 2014-2015 include:
 - Begin immediate program to enhance the **POS training** for golf course managers and BREC Golf administrative staff.
 - Implement **new pricing structure**.
 - Create a BREC Golf **marketing plan** based on NGF recommendations presented earlier. In general, the focus should be on improved use of technology, improved messaging and increased advertising.
 - Enhance the program of **staff training** for improved customer experience.
- **Physical Upgrade Planning** – Begin planning for the physical upgrades that can be made to BREC golf courses to help broaden the appeal of the golf courses, improve the customer experience and improve the infrastructure to help maximize rounds activity.
- **Complete a Staffing Plan**- BREC must create a staffing plan for the golf system administration and each individual facility, and include the full-time/part-time mix of positions.
- **Player Development** – BREC should contact the PGA of America and work with staff to implement one or more of a variety of new golfer development programs that will help to grow golf activity in Baton Rouge and increase rounds at BREC golf facilities.

KEY ACTION ITEMS FOR 2016-2017

The NGF recommended key action items for 2016 and 2017 center around implementing the plans created in 2015 and undertaking action to re-purpose golf facilities that will be removed from the golf system and taking specific action to improve the remaining BREC golf facilities. The key actions steps for 2016 and 2017 include:

- **Physical Enhancements** – The NGF recommended to BREC a concept of “spending money to make money,” noting that several key areas of physical upgrade should be completed at several golf courses. A key action item in 2014-2015 was to plan for these upgrades and NGF recommends that all physical upgrades be completed in the following priority order:
 - **Repairs** – Complete capital investments to repair deficient items and improve the playability of the golf courses. This will help to maximize the number of days the courses are open and thus maximize potential rounds activity. Key items as identified by NGF in the previous section include turf upgrades, drainage improvements, irrigation improvements and structure repairs.
 - **Broaden Appeal** – The NGF noted that the public golf courses that perform the best economically are the ones that have strong appeal to the widest possible segments of golfers, from beginners all the way to seasoned golf professionals. The NGF recommendations included specific ideas to help BREC improve in this area, including adding new forward tees, reducing tree cover, smoothing out fairways and reducing bunkers.
 - **Improving Service** – Additional capital investments are recommended by NGF to help improve the overall customer experience and make some of the BREC golf courses more appealing to group golf activities such as tournaments and outings. These investments include clubhouse upgrades, adding covered outdoor space (pavilion, deck covering), adding basic golf amenities (benches, ball washers, water stations), improving/adding driving ranges and improving on-course restrooms.
- **Implement Re-Purpose** – BREC should cease golf operations at Howell Park and J.S. Clark. If Clark is re-purposed, move all First Tee activities from the Clark property to Dumas.
- **Staffing / Outsource** – BREC should complete implementation of its new staff plan in 2016, including the addition of a new professional golf system manager.
- **Enact marketing Plan** – The new BREC Golf marketing plan should be underway in 2016, with improved activities:
 - **Technology** – Maximize the use of the POS and incorporate into tee sheet and other electronic marketing and communications as described by NGF in this report.
 - **Advertising/Branding** – Produce and implement the appropriate branding and advertising and recommended by NGF.
 - **Outings / Tournaments** – With improved facilities, BREC will improve its outreach to tournaments and outings to be held at BREC facilities.
- **Resource Allocation** – BREC should commit to appropriate resource allocations for staffing and other maintenance and marketing activities as noted by NGF.

ACTION PLAN TIMELINE

The timeline of the BREC Golf Action Plan is shown in the table below. In summary, the specific action plan for BREC Golf centers on six key areas of activity: (1) Master Plan; (2) Re-Purposing some facilities; (3) Enhancing operations; (4) Enhancing physical plant; (5) staffing and oversight; and (6) Marketing.

Key Action Items – Recommended Sequencing

The NGF recommendation for sequencing major items can be shown in the chart below:

Key Action Item	2014-15	2016	2017	2018	2019
Master Plan	Complete				
Re-Purposing	Planning	Enact			
Operational Enhancements	Planning	Enact	Enact	Enact	Enact
Physical Enhancements	Planning	Repairs	Broaden Appeal	Improve Service	
Marketing	Planning / Improve Branding	Enhance Technology			

Analysis of Expected BREC Golf Financial Performance

As part of this NGF Consulting study effort, the consultants have prepared an economic evaluation to show the potential economic performance of the Parish's golf courses under certain operational and/or performance scenarios. In this section of our report, the entire BREC Golf system's economic potential is evaluated and summarized, with estimates of individual facility performance and system-wide performance. All NGF estimates are based on a set of assumptions that may or may not become reality. We feel that these estimates represent the best effort to create a "fair estimate of performance" for these facilities based on our complete review of each Individual operation.

ECONOMIC PERFORMANCE AT VARIOUS ROUNDS TOTALS

NGF has prepared estimates of economic performance for each of the seven individual BREC Golf facilities at various rounds played totals (worst case, 2013 results, modest growth and best case). These estimates are prepared assuming expected 2014 inputs for revenues and expenses with variable rounds played. NGF has prepared these estimates noting that there is variability in expenses at higher rounds (i.e., more maintenance needed when more rounds are played, etc.). As these are estimates, all figures have been rounded to the nearest \$100 for simplicity.

In the tables that follow, NGF has summarized what financial performance can look like at BREC facilities assuming the best and worse conditions. The tables that follow show the estimates of each facility's performance by revenue and expense line items, and are then summarized for a review of the combined 7-facility system. We note that these estimates are intended to show "possibilities" as opposed to realities or projections. Our intent is to show the BREC administration the level of rounds activity that will be required to meet certain defined financial objectives for the system.

The NGF recommendations that are expected to have the most significant economic impact include:

- Improved marketing and operations
- Modified fee structure
- Improved F & B services at Beaver Creek GC , Webb Memorial GC and Historic City Park GC
- Addition of professional management for the golf system
- Possible repurposing of Howell Park GC beginning in 2015, and possibly Dumas (or JS Clark) in 2016
- Committing to a program to control labor expense in the system through natural vacancies and retirements, with some re-staffing completed with part-time staff, when vacancies come open.

Santa Maria GC

Santa Maria Golf Course Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	30,000	35,000	40,000	44,000
Revenue				
Admission Fees (Green Fees)	\$487,500	\$568,800	\$650,000	\$715,000
Equip Rental (Cart Fees)	216,000	252,000	288,000	316,800
Driving Range	57,000	66,500	76,000	83,600
Lessons	18,000	21,000	24,000	26,400
Total Tournament	210,000	245,000	280,000	308,000
Merchandise	150,000	175,000	200,000	220,000
Passes	105,000	122,500	140,000	154,000
Other	1,500	1,800	2,000	2,200
Champions Grill	165,000	192,500	220,000	242,000
Total Revenue	\$1,410,000	\$1,645,100	\$1,880,000	\$2,068,000
Less:				
Direct Cost of Sales	\$194,300	\$226,600	\$259,000	\$284,900
Operating Margin	\$1,215,700	\$1,418,500	\$1,621,000	\$1,783,100
On-Site Facility Expenses:				
Champions Grill				
Wages	\$60,000	\$60,000	\$65,000	\$75,000
Non-Wages	\$11,000	\$11,000	\$12,000	\$14,000
Pro Shop				
Wages	\$190,000	\$190,000	\$200,000	\$210,000
Non-Wages	\$235,000	\$235,000	\$250,000	\$260,000
Maintenance				
Wages	\$320,000	\$335,000	\$350,000	\$375,000
Non-Wages	\$200,000	\$215,000	\$225,000	\$250,000
Total Expense	\$1,016,000	\$1,046,000	\$1,102,000	\$1,184,000
Net Operating Income	\$199,700	\$372,500	\$519,000	\$599,100
*NGF Consulting estimate				

Discussion

The estimate shows that Santa Maria can generate significant net income with rounds at 35,000 (close to 2013 actual), but can really show significant profit with rounds totals at or above 40,000 rounds annually. This volume is achievable for this property, and will take marketing improvements, particularly in the areas of tourist/visitor marketing and greater penetration in hosting organized tournaments, events and outings. Some upgrade of the clubhouse facility and grill area will be required.

Beaver Creek GC

Beaver Creek Golf Course Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	16,500	21,200	27,000	35,000
Revenue				
Admission Fees (Green Fees)	\$280,500	\$360,400	\$459,000	\$595,000
Equip Rental (Cart Fees)	145,200	186,600	237,600	308,000
Driving Range	26,400	33,900	43,200	56,000
Lessons	0	0	0	0
Total Tournament	25,600	32,900	41,900	54,300
Merchandise	38,800	49,800	63,500	82,300
Passes	6,600	8,500	10,800	14,000
Other	800	1,100	1,400	1,800
Creek Café**	37,100	47,700	108,000**	140,000**
Total Revenue	\$561,000	\$720,900	\$965,400	\$1,251,400
Less:				
Direct Cost of Sales	\$50,200	\$64,400	\$111,400	\$144,400
Operating Margin	\$510,800	\$656,500	\$854,000	\$1,107,000
On-Site Facility Expenses:				
Creek Café				
Wages	\$10,000	\$10,000	\$20,000	\$25,000
Non-Wages	\$3,000	\$3,000	\$3,500	\$5,000
Pro Shop				
Wages	\$135,000	\$145,000	\$155,000	\$175,000
Non-Wages	\$100,000	\$115,000	\$125,000	\$135,000
Maintenance				
Wages	\$185,000	\$205,000	\$250,000	\$275,000
Non-Wages	\$175,000	\$195,000	\$220,000	\$225,000
Total Expense	\$608,000	\$673,000	\$773,500	\$840,000
Net Operating Income	(\$97,200)	(\$16,500)	\$80,500	\$267,000
*NGF Consulting estimate. **estimates assume some expansion/improvement of the Creek Café				

Discussion

The estimate shows that Beaver Creek will have to increase activity to achieve a break-even level, assuming appropriate maintenance expense. This facility is not likely to produce positive economic return with rounds played under 25,000 annually, but can produce a high level of facility profit (over \$250,000) if rounds can increase to 35,000 annually. This volume is possible for this property, but will take extraordinary effort and skill from a golf operator with experience in attracting golfers to a 'destination-type' golf facility that is not proximate to their homes. Some upgrade of the clubhouse facility and grill area, plus the addition of a new tournament pavilion will be required.

Webb Memorial GC

Webb Memorial Golf Course Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	26,000	31,300	36,000	42,000
Revenue				
Admission Fees (Green Fees)	\$228,800	\$275,400	\$316,800	\$369,600
Equip Rental (Cart Fees)	156,000	187,800	216,000	252,000
Driving Range	0	0	0	0
Lessons	0	0	0	0
Total Tournament	6,500	7,800	9,000	10,500
Merchandise	32,500	39,100	45,000	52,500
Passes	45,500	54,800	63,000	73,500
Other	1,300	1,600	1,800	2,100
Food & Beverage**	26,000	31,300	81,000**	94,500**
Total Revenue	\$496,600	\$597,800	\$732,600	\$854,700
Less:				
Direct Cost of Sales	\$42,300	\$50,800	\$85,500	\$99,800
Operating Margin	\$454,300	\$547,000	\$647,100	\$754,900
On-Site Facility Expenses:				
Food & Beverage				
Wages	\$0	\$0	\$30,000	\$35,000
Non-Wages	\$0	\$0	\$5,000	\$5,000
Pro Shop				
Wages	\$135,000	\$150,000	\$155,000	\$165,000
Non-Wages	\$90,000	\$100,000	\$110,000	\$115,000
Maintenance				
Wages	\$210,000	\$225,000	\$240,000	\$250,000
Non-Wages	\$90,000	\$115,000	\$130,000	\$150,000
Total Expense	\$525,000	\$590,000	\$670,000	\$720,000
Net Operating Income	(\$70,700)	(\$43,000)	(\$22,900)	\$34,900
*NGF Consulting estimate. **estimates assume some expansion/improvement of the F & B operation				

Discussion

The estimate shows that Webb Memorial will have to generate over 40,000 rounds annually to achieve a break-even level, assuming appropriate maintenance expense. This facility is not likely to produce positive economic return with rounds played under 40,000 annually, but the losses on lower rounds totals appear smaller than other BREC facilities. The keys to growing rounds at Webb Memorial are growing the organized league and group play, and the attraction of some tournaments. Some upgrade of the clubhouse facility, and/or the addition of a new covered deck area will be required.

Historic City Park GC

Historic City Park Golf Course Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	12,500	15,000	22,000	30,000
Revenue				
Admission Fees (Green Fees)	\$84,400	\$101,300	\$148,500	\$202,500
Equip Rental (Cart Fees)	58,100	69,800	102,300	139,500
Driving Range	0	0	0	0
Lessons	0	0	0	0
Total Tournament	1,250	1,500	2,200	3,000
Merchandise	11,250	13,500	19,800	27,000
Passes	10,400	12,500	18,300	24,900
Other	600	800	1,100	1,500
Food & Beverage**	6,250	7,500	49,500**	67,500**
Total Revenue	\$172,250	\$206,900	\$341,700	\$465,900
Less:				
Direct Cost of Sales	\$13,700	\$16,400	\$53,000	\$72,200
Operating Margin	\$158,550	\$190,500	\$288,700	\$393,700
On-Site Facility Expenses:				
Food & Beverage				
Wages	\$0	\$0	\$20,000	\$22,500
Non-Wages	\$0	\$0	\$2,500	\$3,000
Pro Shop				
Wages	\$85,000	\$90,000	\$100,000	\$110,000
Non-Wages	\$25,000	\$30,000	\$35,000	\$40,000
Maintenance				
Wages	\$85,000	\$90,000	\$115,000	\$155,000
Non-Wages	\$25,000	\$30,000	\$45,000	\$60,000
Total Expense	\$220,000	\$240,000	\$317,500	\$390,500
Net Operating Income	(\$61,450)	(\$49,500)	(\$28,800)	\$3,200
*NGF Consulting estimate. **estimates assume some expansion/improvement of the F & B operation				

Discussion

The estimate shows that even if City Park were to double its rounds performance, the facility would just barely achieve a break-even level, assuming appropriate maintenance expense. We further note that this level of rounds activity is at or near a realistic capacity for this 9-hole facility, and assumes strong golf activity almost every day, year-round. The keys to growing rounds at City Park are growing the organized league and group play, especially from the nearby LSU campus. Some upgrade of the clubhouse facility, and/or the addition of a new snack bar area to replace the existing cart storage area will be required.

JS Clark / First Tee

J.S. Clark / First Tee Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	5,600	7,500	12,000	18,000
Revenue				
Admission Fees (Green Fees)	\$33,000	\$44,300	\$70,800	\$106,200
Equip Rental (Cart Fees)	21,600	28,900	46,200	69,300
Driving Range	14,600	19,500	31,200	46,800
Developmental Golf / First Tee	18,200	24,400	39,000	58,500
Total Tournament	1,100	1,500	2,400	3,600
Merchandise	6,700	9,000	14,400	21,600
Passes	2,000	2,600	4,200	6,300
Other	300	400	600	900
Food/Bev. Svc.	4,000	5,300	8,500	12,800
Total Revenue	\$101,500	\$135,900	\$217,300	\$326,000
Less:				
Direct Cost of Sales	\$7,500	\$10,000	\$16,000	\$24,100
Operating Margin	\$94,000	\$125,900	\$201,300	\$301,900
On-Site Facility Expenses:				
Food/Bev. Svc.				
Wages	\$0	\$0	\$0	\$0
Non-Wages	\$0	\$0	\$0	\$0
Pro Shop				
Wages	\$85,000	\$90,000	\$100,000	\$115,000
Non-Wages	\$21,000	\$23,000	\$27,000	\$32,000
Maintenance				
Wages	\$40,000	\$60,000	\$80,000	\$100,000
Non-Wages	\$35,000	\$45,000	\$70,000	\$85,000
Total Expense	\$181,000	\$218,000	\$277,000	\$332,000
Net Operating Income	(\$87,000)	(\$92,100)	(\$75,700)	(\$30,100)
*NGF Consulting estimate				

Discussion

The estimate shows that the JS Clark / First Tee of Baton Rouge facility will always be challenged economically. Even if rounds were to more than double, if BREC continues with the appropriate level of expense, the facility will show a small economic loss on operations. The NGF believes that this is an acceptable result, given that this facility is providing a needed community recreation outlet and is actively developing the new golfers that will ultimately 'graduate' and demand golf at other BREC facilities. The activity estimated at this property can be achieved with minimal capital upgrade to the physical plant, but will require a dedicated effort to maximize participation in camps, groups, schools and the First Tee program.

Dumas GC

Dumas Golf Course Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	13,500	15,000	20,000	30,000
Revenue				
Admission Fees (Green Fees)	\$101,300	\$112,500	\$150,000	\$225,000
Equip Rental (Cart Fees)	99,200	110,300	147,000	220,500
Driving Range	0	0	0	0
Lessons	0	0	0	0
Total Tournament	4,700	5,300	7,000	10,500
Merchandise	13,500	15,000	20,000	30,000
Passes	20,300	22,500	30,000	45,000
Other	700	800	1,000	1,500
Waterfront Café	30,400	33,800	45,000	67,500
Total Revenue	\$270,100	\$300,200	\$400,000	\$600,000
Less:				
Direct Cost of Sales	\$35,600	\$39,500	\$52,700	\$79,000
Operating Margin	\$234,500	\$260,700	\$347,300	\$521,000
On-Site Facility Expenses:				
Waterfront Café				
Wages	\$25,000	\$25,000	\$30,000	\$35,000
Non-Wages	\$3,000	\$3,000	\$5,000	\$5,000
Pro Shop				
Wages	\$135,000	\$145,000	\$155,000	\$165,000
Non-Wages	\$90,000	\$90,000	\$95,000	\$105,000
Maintenance				
Wages	\$210,000	\$225,000	\$235,000	\$250,000
Non-Wages	\$85,000	\$95,000	\$100,000	\$105,000
Total Expense	\$548,000	\$583,000	\$620,000	\$665,000
Net Operating Income	(\$313,500)	(\$322,300)	(\$272,700)	(\$144,000)
*NGF Consulting estimate.				

Discussion

The NGF has observed that Dumas is showing the highest level of subsidy on operations of any of the BREC golf facilities. This is due to a “perfect storm” of causes, including low activity, low fees and the expenses of an 18-hole facility with larger clubhouse operation. Our estimates show that even if Dumas were to double its rounds activity, there would still be a large loss on operations, assuming the same fee structure and comparable expenses. Thus, the only way to really improve the economics of Dumas is to increase the average revenue per round at the facility, which can only be achieved through a comprehensive renovation of the greens, turf and irrigation, likely costing over \$850,000.

Howell Park GC

Howell Park Golf Course Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	7,000	8,000	16,000	25,000
Revenue				
Admission Fees (Green Fees)	\$42,000	\$48,000	\$96,000	\$150,000
Equip Rental (Cart Fees)	42,000	48,000	96,000	150,000
Driving Range	0	0	0	0
Lessons	0	0	0	0
Total Tournament	3,850	4,400	8,800	13,750
Merchandise	3,500	4,000	8,000	12,500
Passes	7,000	8,000	16,000	25,000
Other	400	400	800	1,300
Food & Beverage	6,300	7,200	14,400	22,500
Total Revenue	\$105,050	\$120,000	\$240,000	\$375,050
Less:				
Direct Cost of Sales	\$8,800	\$10,100	\$20,200	\$31,500
Operating Margin	\$96,250	\$109,900	\$219,800	\$343,550
On-Site Facility Expenses:				
Food & Beverage				
Wages	\$0	\$0	\$0	\$0
Non-Wages	\$0	\$0	\$0	\$0
Pro Shop				
Wages	\$30,000	\$100,000	\$115,000	\$140,000
Non-Wages	\$15,000	\$45,000	\$55,000	\$65,000
Maintenance				
Wages	\$90,000	\$125,000	\$160,000	\$200,000
Non-Wages	\$80,000	\$55,000	\$85,000	\$120,000
Total Expense	\$215,000	\$325,000	\$415,000	\$525,000
Net Operating Income	(\$118,750)	(\$215,100)	(\$195,200)	(\$181,450)
*NGF Consulting estimate.				

Discussion

The observations of Howell park performance are very similar to those just noted on Dumas GC. Both facilities are requiring large subsidies on operations for the same reasons of low activity and low fees, coupled with the expenses of an 18-hole facility. Our estimates show that even if Howell Park were to triple its rounds activity, there would still be a large loss on operations, assuming the same fee structure and comparable expenses. Thus, the only way to really improve the economics of Howell Park is to increase the average revenue per round at the facility, which can only be achieved through a comprehensive renovation of the greens, turf and irrigation, likely costing over \$1.2 million. Given the location of the facility and the lack of golfer population in its vicinity, the higher rounds activity may not be possible to achieve in any circumstance or facility condition.

Full BREC System

BREC System (7 Courses) Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	111,100	133,000	173,000	224,000
Revenue				
Admission Fees (Green Fees)	\$1,257,500	\$1,510,700	\$1,891,100	\$2,363,300
Equip Rental (Cart Fees)	738,100	883,400	1,133,100	1,456,100
Driving Range	98,000	119,900	150,400	186,400
Lessons	18,000	21,000	24,000	26,400
Developmental Golf / First Tee	18,200	24,400	39,000	58,500
Total Tournament	253,000	298,400	351,300	403,650
Merchandise	256,250	305,400	370,700	445,900
Passes	196,800	231,400	282,300	342,700
Other	5,600	6,900	8,700	11,300
Food & Beverage**	275,050	325,300	526,400**	646,800**
Total Revenue	\$3,116,500	\$3,726,800	\$4,777,000	\$5,941,050
Less:				
Direct Cost of Sales	\$352,400	\$417,800	\$597,800	\$735,900
Operating Margin	\$2,764,100	\$3,309,000	\$4,179,200	\$5,205,150
On-Site Facility Expenses:				
F & B Wages	\$95,000	\$95,000	\$165,000	\$192,500
F & B Non-Wages	\$17,000	\$17,000	\$28,000	\$32,000
Pro Shop Wages	\$795,000	\$910,000	\$980,000	\$1,080,000
Pro Shop Non-Wages	\$576,000	\$638,000	\$697,000	\$752,000
Maintenance Wages	\$1,140,000	\$1,265,000	\$1,430,000	\$1,605,000
Maintenance Non-Wages	\$690,000	\$750,000	\$875,000	\$995,000
Total Expense	\$3,313,000	\$3,675,000	\$4,175,000	\$4,656,500
Net Operating Income	(\$548,900)	(\$366,000)	\$4,200	\$548,650
*NGF Consulting estimate. ** assume some expansion/improvement of F & B operations at BC, W and CP				

Summary of Estimated Economic Performance

NGF estimates of performance at various rounds totals show that if the BREC system is to continue “as-is,” it is likely that the net income from the golf system will remain highly subsidized, unless the system can improve activity to 173,000 total system rounds, or a 30% increase over actual 2013 activity. While this increase is realistic and achievable, it will require some change in the operation, and likely require a professional operator that could be secured for the system via management contract (as recommended by NGF). This level of production will also require some capital investment in the facilities, as noted previously.

If BREC can complete the facility enhancements as recommended by NGF, leading to expanded F & B capacity and the sale of more tournaments, outings and leagues, the revenues generated by the golf facilities should at least be sufficient to cover the direct on-site expenses, but still not enough to cover all overhead or the capital required to upgrade the facilities. The NGF estimates also show the depth of economic trouble at facilities like Howell Park and Dumas, both of which cannot cover on-site expenses even with significant increase in activity, and thus increases in revenue can only be achieved with considerable capital investment.

ESTIMATED ECONOMIC PERFORMANCE – REPURPOSE CONSIDERATIONS

The estimates in this section show how the combined BREC system would look if the Parish were to commit to a program of repurposing underperforming golf courses Howell Park and J.S. Clark GC. NGF has considered the performance of the Parish golf system under the consideration that the Parish will cease golf operations at Howell Park beginning in 2015, J.S. Clark in 2016, and the land used as an open space park with multiple uses, such as ball/soccer fields, open space, bike trails, jogging trails, dog walk, Frisbee parks, etc. This review was completed to show the Parish what the BREC golf system would look like economically, assuming the other golf courses continue to operate “as-is.”

Howell Park / J.S. Clark Repurpose

If BREC were to undertake this course of action, the NGF would expect:

- NGF estimates approximately 1/3 of Howell Park and J.S. Clark annual rounds would be absorbed by other BREC golf courses:
 - Webb Memorial and City Park would add 3,000 to 4,000 rounds per year in 2015-2018
 - Santa Maria and Beaver Creek would add 1,000 to 2,000 rounds per year in 2015-2018
 - Dumas would add 2,000 to 4,000 rounds per year in 2015-2018
- BREC Golf System Admin charges would likely remain at historical levels. It is assumed that even if the system is reduced by one or two golf courses the total admin charges would remain intact.

BREC System W/O Howell Park and J.S. Clark

BREC System (5 Courses w/o Howell + J.S. Clark) Estimated Economic Performance* at Various Rounds Totals				
	Worst	2013	Increase	Best
Total Rounds	109,500	128,000	156,000	193,000
Revenue				
Admission Fees (Green Fees)	\$1,286,600	\$1,519,800	\$1,828,800	\$2,218,400
Equip Rental (Cart Fees)	744,600	874,900	1,062,300	1,312,900
Driving Range	86,900	104,400	122,700	143,100
Lessons	18,600	21,600	24,600	27,000
Developmental Golf / First Tee	18,200	24,400	39,000	58,500
Total Tournament	258,700	303,450	350,900	397,200
Merchandise	263,100	309,150	365,400	429,800
Passes	204,500	236,000	279,100	329,300
Other	5,600	6,400	7,900	9,800
Food & Beverage**	283,400	331,850	533,300**	643,550**
Total Revenue	\$3,170,200	\$3,731,950	\$4,614,000	\$5,569,550
Less:				
Direct Cost of Sales	\$361,200	\$423,400	\$594,400	\$715,500
Operating Margin	\$2,809,000	\$3,308,550	\$4,019,600	\$4,854,050
On-Site Facility Expenses:				
Food & Beverage				
Wages	\$95,000	\$95,000	\$165,000	\$192,500
Non-Wages	\$17,000	\$17,000	\$28,000	\$32,000
SM Pro Shop				
Wages	\$680,000	\$720,000	\$765,000	\$825,000
Non-Wages	\$540,000	\$570,000	\$615,000	\$655,000
SM Maintenance				
Wages	\$1,010,000	\$1,080,000	\$1,190,000	\$1,305,000
Non-Wages	\$575,000	\$650,000	\$720,000	\$790,000
Total Expense	\$2,917,000	\$3,132,000	\$3,483,000	\$3,799,500
Net Operating Income	(\$108,000)	\$176,550	\$536,600	\$1,054,550
*NGF Consulting estimate. ** assume some expansion/improvement of F & B operations at BC, W and CP				

Summary of Golf Course Repurposing Considerations

The proposed reduction of two of the golf courses (Howell and J.S. Clark) in the system as a means to reduce expense is recommended by NGF, as we have documented there is too much golf in the system in relation demand in 2014. Our economic review of the option does show that the BREC Golf Division economic performance does improve with the closure of Howell Park and J.S. Clark. However, we note that this review still shows that while it is likely the system can cover all on-site expenses with activity at 2013 levels, the overall loss in the system after all administrative and overhead charges is likely to remain. As noted by NGF, the optimal result with Dumas would be to find a way to move all First Tee activities over to Dumas and repurpose J.S. Clark.

ESTIMATED ECONOMIC PERFORMANCE UNDER MANAGEMENT COMPANY OPERATION

NGF has estimated the performance of the BREC golf system under the implementation of a management contract, using a 5% of revenue estimate for management fee (it is possible that BREC can negotiate to lower fees). Under this scenario, the BREC will be responsible for all capital improvements, as is customary under management contracts. This program is simply hiring a company to manage the operations for BREC in exchange for a management fee paid to the management company. NGF has assumed that BREC can find an interested third party willing to take on four or five facilities, depending on re-purpose options considered by BREC.

The result of this review shows that the BREC will be adding a new \$207,000+ expense line to the BREC golf system. Unless the new management company can increase revenue OR reduce expenses (or combination) by \$207,000, there will be no net change in net income performance. Many of the nationally recognized golf management companies that specialize in municipal golf operations have a track record of increasing revenue and reducing expenses through golf management expertise and technology systems that are in place within these organizations. Key assumptions in the management company performance estimate include:

- All revenue and expense estimates are assumed as previously projected by NGF;
- Direct cost of sales and pro shop operating expenses based on actual performance;
- All labor expenses are reduced by 15% to reflect management company (private sector) operation; and
- Management fee is estimated at 6% of total revenue (from all sources).

Estimated Management Fees

The most typical management agreement that NGF observes today involve compensation that comprises a fixed dollar amount plus an incentive component that is predicated on percentages of gross receipts or net income, over and above the established minimum revenues (terms may be influenced by IRS regulations if tax-exempt bond financing is involved). The incentive earned is typically predicated on the municipality achieving its predetermined goals with respect to financial performance. Also, the operating expense budget must be maintained at the original projection for incentives to be earned. Total compensation to the management company varies depending on the size of the facility and the level of responsibility of the management firm, but the industry "standard" is 3% to 6% of total facility gross revenues. BREC should anticipate a management fee for the BREC golf courses to be:

Estimated Management Fees BREC Golf Courses			
Facility	2013 Gross Revenue	Low Management Fee Estimate	High Management Fee Estimate
Santa Maria	\$1,612,589	\$48,400	\$96,800
Beaver Creek	\$642,536	\$19,300	\$38,600
Webb Memorial	\$591,657	\$17,700	\$35,500
City Park	\$174,135	\$5,200	\$10,400
Dumas / JS Clark	\$432,158	\$13,000	\$25,900
Total	\$3,453,075	\$103,600	\$207,200

BREC System - Management Company Operation

Our economic review of the option shows that the BREC Golf Division economic performance does improve slightly with the addition of a third-party operator in a five-course system with a six percent (6%) management fee. We note that this improvement is derived almost entirely from reductions in labor expense, which may not become reality. In the vast majority of cases that NGF has reviewed, the addition of a third-party operator for public-agency golf facility management will lead to approximately 15% reduction in labor expense. In the case of BREC, an increase in revenue is the greater challenge and unless the new management vendor can bring total rounds and revenue to the "Increase" or even "Best Case" level, the benefit from the arrangement may not be realized with BREC facilities. The NGF notes that growth to the Best Case level at BREC facilities will require an enhanced level of on-site management of the golf courses and if BREC is not able to achieve this internally, then the third-party management options becomes much more appropriate.

BREC System (Management Company Operation - 5 Courses) Estimated Economic Performance* at Various Rounds Totals				
	Worst Case	Appx. 2013	Increase	Best Case
Total Rounds	90,600	110,000	137,000	169,000
Total Revenue	\$2,741,350	\$3,306,600	\$4,137,000	\$4,966,000
Less:				
Direct Cost of Sales	\$308,000	\$368,200	\$524,900	\$625,400
Operating Margin	2,433,350	2,938,400	3,612,100	4,340,600
On-Site Facility Expenses:				
Total Expense	\$2,319,000	\$2,519,500	\$2,858,000	\$3,153,375
Total Management Fee	\$207,000	\$207,000	\$207,000	\$207,000
Net Operating Income	(\$92,650)	\$211,900	\$547,100	\$980,225
*NGF Consulting estimate. ** assume some expansion/improvement of F & B operations at BC, W and CP				

Summary Statement

It is our opinion that the Parish's golf system is at a very critical point in its history. Declining performance has not only created stress within the system, but has resulted in a lack of reinvestment in the golf courses in terms of day-to-day maintenance and deferred capital repairs. The position the Parish is in is a familiar one to NGF. If action steps are taken to address observations in this report, the golf program is likely to improve operations and help reduce Parish subsidies. Recent cuts in expenses have affected the performance of the golf courses and can end up reducing revenue by more than the cost savings.

Yet, there is a lot of reason for optimism as well. Several of these golf facilities are well positioned within the community, and golfer sentiment is such that if improvement is made, they will return. Still, the Baton Rouge area is not a particularly strong golf market at present, and so more 'hands-on' effort to stimulate greater activity is required to make this reduced system work, and this includes reaching out to less traditional golf populations (like women and minorities), as well as existing (but underserved) markets like tourists, corporations and tournaments.

In summary, our findings are that the BREC is operating popular golf facilities with amenities that are good enough to generate close to \$3.6 million in revenue in 2013. The NGF found six key specific areas that we feel are the most significant contributors to the recent declines in economic performance of BREC Golf Courses:

1. Poor golf course conditions at BREC golf courses, especially the greens
2. A need for restructuring the operation and enhancing the use of technology
3. Inadequate ancillary amenities at several facilities, including limited F & B
4. A need to improve marketing to include both passive and active marketing efforts
5. A need for streamlining staffing and park oversight where it makes sense
6. Uncontrollable factors such as recent recession and the general lack of golf 'tradition' within the local population

In review of the BREC golf system, NGF finds that action on these above items will provide the greatest relief of economic stress to the system, although working to consolidate the system under a single operator will also help to relieve some economic stress. Assuming it is in the best interest of the BREC for the golf system to remain viable, it is expected that these changes will provide some economic relief to the BREC Golf Fund.

The most important NGF recommendations for BREC Golf include:

1. Upgrade the physical condition of the golf courses and clubhouses
2. Modify the operational structure and employ professional management
3. Repurpose Howell Park and J.S. Clark GCs to a use other than golf
4. Improve technology and marketing
5. Enhance food and beverage service at all facilities
6. Make all the golf courses more appealing to less traditional golfers, especially women and minorities.

Limiting Conditions

The evaluation of BREC Golf facilities was accomplished to form the basis of recommendations by NGF Consulting. The evaluation covers the base facilities (i.e., the golf course, practice areas, clubhouse, maintenance facilities and grounds.) The evaluation does not provide in-depth evaluation of infrastructure, systems or analysis of such. More in-depth study, evaluation and analysis will be required to act upon conclusions presented within this report. In general, this additional study is best accomplished by detailed Master Plans, specific professional evaluations of infrastructure and structures (such as architectural surveys, structural inspections, irrigation audits, etc.) and prioritization consulting based on “cost vs. return” analysis.

All Statements of the Probable Cost (“Estimates”) represent the best estimates that can be provided in the context of the present work contracted to NGF Consulting. Cost estimates represent our best judgment of the probable costs as a design professionals and consultants. It is recognized, however, that we do not have control over the cost of labor, materials, equipment or course accessories, over contractors’ methods of determining bid prices, or over competitive bidding, market or negotiating conditions. Accordingly, NGF Consulting cannot state that proposed budgets, cost estimates and assumptions presented here will not vary depending on these factors or findings of further study and inspection.

Appendices

Appendix A – Golf Industry Standards and Norms

Appendix B – NGCOA Guidelines for Third-party Resellers

Appendix C – Golf Course Life Cycle

APPENDIX A – GOLF INDUSTRY STANDARDS AND NORMS

NGF has presented a selection of basic golf industry information designed to help educate East Baton Rouge Parish on “reasonable expectations” for public golf operations in the U.S. Information provided includes operational norms for public golf courses (rounds, revenues, expenses, staffing) as well as some other “standards” consistent with successful public golf courses.

Public Golf Operational Norms

For comparison purposes to BREC Golf courses, we present a review of selected NGF data from our bi-annual surveys of golf facilities, supplemented by data provided by the PGA of America through its “*Performance Trak*” data collection. This includes data from the aggregate of all golf courses in the U.S. (by category), as well as data from selected sub-categories of golf facilities including mid-range (middle fee) public golf facilities. These data are detailed in the National Golf Foundation publication, *Operating & Financial Performance Profiles of 18-hole Golf Facilities in the U.S.* These figures were included and used for this effort as they represent “reasonable estimates” for comparison to Baton Rouge Parks golf courses. In addition, NGF Consulting has added estimates from the “*Future of Public Golf in America*” study completed in 2012 and presented at the annual NGF Golf Business Symposium.

Public Golf Facility Rounds Expectations

NGF research indicates that the average number of rounds played per 18-hole golf course has been declining in the last 25 years. The totals now stand at an average of 31,527 rounds for municipal golf courses, 26,071 for all daily fee (privately-owned, open to the public), and 19,402 for private (member only) clubs. We note these figures all represent significant declines since 1985, with acceleration of decline since 2001. As a benchmark comparison, average rounds per 18-hole municipal golf course was around 42,000± in 2000 and just over 36,000± rounds in 2005. NGF uses a golf industry standard that defines a round of golf as “one individual beginning a round in an authorized start” – NGF is essentially counting “starts” as a round.

Average Total Rounds Played By Facility Type 2009, 2011 + 2012			
	2009	2011	2012
Daily Fee	26,009	24,394	26,071
Municipal	32,497	29,681	31,527
Private	17,748	18,323	19,402
Source: National Golf Foundation and PGA <i>Performance Trak</i> .			

Public Golf Facility Revenue Expectations

NGF research indicates that the total of all golf facility revenues in the U.S. represents a \$22.3 billion industry, down from a peak of \$29.1 billion in 2005. The section below shows the NGF estimate for total golf facility revenue (public and private combined) in the United States for recent years.

Revenue Detail for ‘Standard’ Public Golf Courses

Further detail on ‘standard’ public golf facility operations in the United States has been collected by NGF over the years, a summary of which is presented below for 2009 and 2012. ‘Standard’ public golf courses are those with green fees below \$40 (excluding carts). The NGF consultants feel that this represents the best measure of comparison to performance at BREC Golf Courses, and is used for this purpose throughout the NGF engagement for East Baton Rouge Parish.

Public Standard Average Revenues

	2005	2012*	% change
Green fees, cart fees and member/passholder revenue	\$679,280	\$666,100	-1.9%
All other golf revenue	\$76,930	\$75,000	-2.5%
F&B revenue (incl. banquets)	\$214,400	\$192,200	-10.4%
Merchandise revenue	\$80,080	\$78,300	-2.2%
All other operating revenue	\$37,560	\$35,400	-5.8%
Total Revenue	\$1,088,250	\$1,047,000	-3.8%

Source: *Operating & Financial Performance Profiles of 18-Hole Golf Facilities in the U.S.*, 2011 edition, National Golf Foundation, and "Future of Public Golf in America" study – 2012. *Estimated totals derived from sample research in 2012.

Public Golf Facility Expense Expectations

NGF research indicates that all golf facilities in the U.S. had a total of \$21.3 billion in direct operating expenses, down 20.5% from a high of \$26.8 billion in 2001. The section below shows the NGF estimate for total golf facility expenses (public and private combined) in the United States for recent years.

Operating Expense Detail for 'Standard' Public Golf Courses

Further detail on 'Standard' public golf facility operational expenses in the United States from 2005 and 2012 are displayed below. NGF will use these figures for comparison to BREC Golf Courses throughout the NGF engagement for East Baton Rouge Parish.

Public Standard Average Expenses

	2005	2012*	% change
Total maintenance costs	\$377,160	\$442,300	17.3%
Golf car fleet costs	\$31,120	\$32,500	4.4%
COGS F&B	\$86,360	\$77,400	-10.4%
COGS merchandise	\$56,450	\$55,200	-2.2%
Other expenses	\$315,280	\$389,800	23.6%
Total Expenses	\$866,360	997,200	15.1%

Notes: "Total maintenance costs" includes payroll, supplies, and equipment. "Other expenses" is a large category because it includes all non-maintenance payroll and all other operating expenses. Source: National Golf Foundation 2013.

Other Expense Findings

NGF has also included basic information on golf industry 'standards' for golf courses of all types in all climates. Industry standards can vary depending upon specific courses, but as a "rule of thumb," allocated spending in key areas coincide with the percentages displayed below. The two most significant of these figures for the analysis of BREC Golf Courses are the percentage of labor expense and utilities, as addressed by NGF for each individual facility.

Key Area	Allocated Spending
Labor	50%
Products, Supplies & Repair	15%
Services (Incl. Equipment)	10%
Utilities	5%
Other	20%

Source: Golf Course Superintendents Association of America (GCSAA) and NGF. Expense totals do not include non-recurring capital expenses, amortization, or depreciation.

Public Golf Facility Average Revenue and Expense per Round

The following section provides NGF estimates for revenues and expenses per round of golf played for each of 'Standard' golf facilities.

Public 'Standard' Revenue and Expense per Round

NGF research indicates that public golf courses in the U.S. with green fees under \$40 average \$33.21 in total facility revenue per round of golf in 2012. Of this figure, \$23.51 (70.8%) is derived from "golf" sources (green, cart, pass fees and driving range), with the remaining \$9.70 (29.2%) per round derived from "ancillary" (mostly merchandise, food + beverage) sources. Overall, this figure has increased by almost 10% between 2005 and 2012, although we note that 2012 was a particularly strong year for golf in much of the U.S. due to outstanding winter weather.

Standard Public Golf Courses Average Revenue Per Round			
	2005	2012	% change
Total Revenue	\$30.23	\$33.21	9.9%
Golf Revenue	\$21.01	\$23.51	11.9%
F&B revenue (incl. banquets)	\$5.96	\$6.10	2.3%
Merchandise revenue	\$2.22	\$2.48	11.7%
All other operating revenue	\$1.04	\$1.12	7.7%
Source: <i>Operating & Financial Performance Profiles of 18-Hole Golf Facilities in the U.S.</i> , 2011 edition, National Golf Foundation, and "Future of Public Golf in America" study – 2010			

Lower-fee public golf courses in the U.S. average \$31.63 in total facility expenses per round of golf. Of this figure, \$14.03 (44.4%) is derived from golf course maintenance, with the remaining \$17.60 (55.6%) per round derived from all other expenses. Overall, this figure increased by about 31.5% between 2005 and 2012.

Standard Public Golf Courses Average Expense Per Round			
	2005	2012	% change
Total maintenance costs	\$10.47	\$14.03	34.0%
Golf car fleet costs	\$0.86	\$1.03	19.8%
Total COGS	\$3.97	\$4.21	6.0%
Other expenses	\$8.76	\$12.36	41.0%
Total Facility Expense	\$24.06	\$31.63	31.5%
Source: <i>Operating & Financial Performance Profiles of 18-Hole Golf Facilities in the U.S.</i> , 2011 edition, National Golf Foundation, and "Future of Public Golf in America" study – 2012			

Public Golf Course Staffing

As noted for each individual facility, BREC Golf is operating its facilities with Parish labor in all areas of operation, except food and beverage service. This structure is the single most common organizational arrangement for municipal golf courses in the U.S., although the trend is moving in the direction of privatizing as an effort to reduce labor expense. The discussion that follows will help Baton Rouge identify a “standard” for staffing a public golf course operation for ultimate use in establishing a program for staffing at all BREC Golf courses. However, we note that given the relative quality of each facility and the level of rounds played and revenue production, it is clear that a “one size fits all” approach will not be appropriate for this system.

There are no industry standards that can be referenced to determine the appropriate staffing levels for a golf operation. The number of staff needed for a particular golf operation depends on several factors, not the least of which is budget considerations. Personnel costs typically represent the largest single expense item in a golf course operation, as is the case for BREC Golf courses. Therefore, an analysis of these costs is essential to understanding the financial performance of BREC Golf operation. The NGF review of public golf operations nationwide in 2012 revealed the following averages for full-time staffing at 18-hole public golf courses nationwide:

U.S. Averages Distribution of Staffing – Full-Time Equivalents (Year-Round)						
		Total U.S.	Daily Fee Golf Courses by season length		Municipal Golf Courses by season length	
	“Typical” BREC Golf Course in 2012**	Avg.*	10-12 mos.*	<10 mos.*	10-12 mos.*	<10 mos.*
Golf Maintenance Staff	7.0	10.0	9.5	7.0	10.5	9.0
Pro Shop Staff	7.0	6.5	6.0	5.0	7.5	5.5
Clubhouse Staff (F&B)	Incl.	3.0	3.0	2.0	2.0	2.5
Total	14.0	19.5	18.5	14.0	20.0	17.0
Source: National Golf Foundation. *Includes average per 18 holes and is based on combination of PT and FT. **Includes only the 18-hole courses Santa Maria, Dumas, Howell Park, Webb Memorial, and Beaver Creek.						



NATIONAL GOLF COURSE OWNERS ASSOCIATION

Best Practices

when contracting a Third Party Tee-Time Reseller

The NGCOA recommends that golf courses opting to use Third Party Tee-Time Resellers utilize the Best Practices below to protect their business interests and manage business relationships with Third Party Tee-Time Resellers.

1. **Signed Written Contract.** All agreed upon terms and conditions should be contained in a written document signed by representatives of both parties who have authority to execute binding legal agreements.
2. **Term.** The term of the agreement should be clearly defined. The Golf Course should have the right to immediate termination with no penalty for any breach of the agreement by the Third Party. It is also in the interest of the Golf Course to incorporate in the agreement the shortest possible notice period for termination without cause.
3. **Best Rate Guarantee.** The Golf Course should contract so that their own posted rates and promotions are the best offers at all times, or equivalent to the best available. Any exceptions must require written consent in advance.
4. **Data Ownership.** The Third Party should provide unfiltered access to the Golf Course of all pertinent customer information, forwarding all such data in whatever form and timing is mutually agreed upon. The Golf Course acquires ownership of all such data immediately upon receipt.
5. **Payment Model.** Terms of payment should be clearly defined. The NGCOA recommends a commission based model which calls for a reasonable percentage paid to the Third Party on tee-times actually sold. If a merchant model is used instead (course provides tee-time at net rate to Third Party and then Third Party sells to golfer at gross rate), then a defined mark up from net to gross rates should be included in the agreement.
6. **Auction Model.** No auctioning of tee-times by the Third Party should be permitted without the expressed written consent by the Golf Course. Golf Course should in that case still provide a floor below which the round cannot be sold by the Third Party so that the course preserves its best rate guarantee.
7. **URL Ownership.** The Golf Course should own and protect its Uniform Resource Locator (URL) for all its own websites at all times.
8. **Search Engine Optimization.** To protect the Golf Course from online golfer searches being diverted away from its own websites, the Third Party should not use the Golf Course or related facility names for their own search engine optimization (SEO) without written consent from the Golf Course.
9. **Selective Inventory.** The Golf Course should retain the right to offer the Third Party only that tee-time inventory that it deems to be in its own best interest to market through the Third Party.
10. **Brand Protection.** The Third Party should only utilize the Golf Course's name, logo, slogans, photographs, images, marks, and promotions for the marketing purposes specified within the contract. The Golf Course retains the sole right to determine any updated presentation of these marketing properties on the Third Party website or any other marketing materials. ▶



NATIONAL GOLF COURSE OWNERS ASSOCIATION

- 10. Loyalty & Membership Programs.** Any Third Party loyalty or membership programs that leverage the customers of the Golf Course should be fully disclosed within the contract. The Golf Course should be diligent about protecting itself from any such programs that will be competing with its own loyalty or membership program.
- 11. Indemnification & Regulatory Compliance.** The Third Party should protect the Golf Course from all possible liability for taxation and regulatory matters related to the resale of tee-times, both state and federal. The Third Party should be fully compliant with all relevant regulatory standards, including the Privacy Act and PCI Compliance.
- 12. Additional Services.** If the Third Party is offering additional services beyond tee-time reselling, all such services and any related fees should be specified in the contract.
- 13. Price Parity.** The Golf Course retains the sole right to impose price parity (same price for the same product throughout all marketing and distribution channels).
- 14. Online Links.** The Third Party should be required to fully disclose all proposed links to any other sites, in writing and in advance.
- 15. Transferability.** The Third Party should not be entitled to sell, give, partner, or transfer by any means its reseller services as they relate to the Golf Course to any other Third Party without the express written consent of the Golf Course. Further, the Golf Course retains the right to terminate or otherwise adjust the terms and conditions of the agreement upon any type of transfer.
- 16. Exclusivity.** The Golf Course should retain the right to work with any other Third Party.
- 17. Confidentiality.** The Third Party should not be entitled to a confidentiality clause that prevents the Golf Course from disclosing the terms of the agreement.
- 18. Proprietary Business Information.** The Golf Course should request reasonable protection for all proprietary business information that may be exposed to the Third Party as a result of the business relationship.
- 19. Support Services.** The contract should define all of the Third Party support services to the Golf Course including IT, customer relations, marketing and consultation.
- 20. Legal Entity.** The contract should define the legal business configuration of the Third Party and clearly state that the Third Party will present itself as an entity separate and independent from the Golf Course.

APPENDIX C – EXPECTED LIFE CYCLE

GOLF COURSE ITEMS

EXPECTED LIFE CYCLE

HOW LONG SHOULD PARTS OF THE GOLF COURSE LAST?

ITEM	YEARS	ITEM	YEARS
Greens (1)	15 – 30 years	Cart Paths – concrete	15 – 30 years
Bunker Sand	5 – 7 years	Practice Range Tees	5 – 10 years
Irrigation System	10 – 30 years	Tees	15 – 20 years
Irrigation Control System	10 – 15 years	Corrugated Metal Pipes	15 – 30 years
PVC Pipe (under pressure)	10 – 30 years	Bunker Drainage Pipes (3)	5 – 10 years
Pump Station	15 – 20 years	Mulch	1 – 3 years
Cart Paths – asphalt (2)	5 – 10 years (or longer)	Grass (4)	Varies

NOTES: (1) Several factors can weigh into the decision to replace greens: accumulation of layers on the surface of the original construction, the desire to convert to new grasses and response to changes in the game from an architectural standpoint (like the interaction between green speed and hole locations). (2) Assumes on-going maintenance beginning 1 – 2 years after installation. (3) Typically replaced because the sand is being changed — while the machinery is there to change sand, it's often a good time to replace the drainage pipes as well. (4) As new grasses enter the marketplace — for example, those that are more drought and disease tolerant — replanting may be appropriate, depending upon the site.

Component life spans can vary depending upon location of the golf course, quality of materials, original installation and past maintenance practices. We encourage golf course leaders to work with their golf course architect, superintendents and others to assess the longevity of their particular course's components.

The American Society of Golf Course Architects (ASGCA) thanks those at the USGA Green Section, Golf Course Builders Association of America, Golf Course Superintendents Association of America and various suppliers for their assistance in compiling this information.

The materials presented on this chart have been reviewed by the following Allied Associations of Golf:

For more information,
contact ASGCA at
262-786-5960 or
www.asgca.org



DATA COMPILED BY ASGCA, 125 NORTH EXECUTIVE DRIVE, SUITE 106, BROOKFIELD, WI 53005

Friends of the Baton Rouge Zoo

Feasibility Study

Final Report

May 2015

Project Team:

Rick Biddle

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Schultz & Williams

Schultz & Williams (S&W) is an established consulting firm that provides comprehensive strategies – including planning, development, direct response, interim staffing, and marketing – to nonprofits of all types and sizes across the nation, with a particular specialization on zoos and aquaria.

S&W draws upon our hands-on experience in directly leading over 80 unique planning projects for our Association of Zoos and Aquariums (AZA) clients. Since 1987, the success and integrity of our work and of our team of seasoned nonprofit leaders and experts have been driven by one simple philosophy: management, development and marketing strategies must be fully integrated in order for organizations to achieve financial stability, operational excellence and, ultimately, their mission-related goals.

S&W has extensive experience working with zoos of all sizes across the country. We have helped develop strategic, business, and operational plans for over eighty AZA-accredited institutions, with budgets ranging from less than \$1,000,000 to well over \$50,000,000, and attendance ranging from 75,000 to over 3,000,000 visitors.

Schultz & Williams is headquartered in Philadelphia, PA with operations in Los Angeles, CA and Washington, DC.

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Appendices:

Interview Request Letter

List of External Interviewees

The Friends of the Baton Rouge Zoo (FOZ) retained Schultz & Williams (S&W) in November 2014 to conduct a mini-feasibility study to test the options and opportunities of a significant reinvention of and investment in the current visitor experience including assessing the ideal site location and potential funding structure for the future Zoo.

Schultz & Williams appreciates the opportunity to work with the Friends of the Baton Rouge Zoo to conduct this study. We commend the entire Friends of the Zoo Board of Directors along with the Zoo Executive Director Phil Frost and BREC's Superintendent Carolyn McKnight for their leadership and willingness to engage the key community, political and philanthropic leaders in a conversation about the current and future role of the Zoo in Baton Rouge and the nine parish region as we begin to gauge the community's willingness to support a transformation of the Zoo.

S&W expresses particular thanks to Kaki Heiligenthal, Director of Marketing and Development of the Friends of the Zoo, for helping prepare the S&W team for their meetings and for the scheduling of the interviews that were vital to this study.

The purpose of this feasibility study was to determine the degree to which the Zoo possesses the fundamental requirements for moving forward with this exciting new initiative including: ***the level of community support for a major Zoo renovation/improvement; to what extent and in what nature this support exists; and whether, from a business standpoint, the community sees the Zoo's current location as a viable option for any major future endeavors.***

Methodology

To become completely informed about FOZ's vision for the Zoo, S&W reviewed background materials about the Baton Rouge Zoo and the Friends including:

- Financial information and annual reports;
- Strategic planning documents;
- The most recent facility master plan and supporting materials;
- Operational information including marketing plans, historical attendance data and visitor surveys;
- Membership history; and
- Organizational chart, job descriptions and board structure.

To further enhance our understanding of the Zoo, we traveled to Baton Rouge to tour the Zoo and to gain a better understanding of the Zoo's future direction. During that trip, we had introductory meetings with the FOZ Board of Directors and BREC's Superintendent Carolyn McKnight.

Building upon our baseline understanding of the Zoo, we had regular calls with the leadership of the Zoo to create a project profile that outlined re-imagined visitor and animal experiences for the Baton Rouge Zoo.

Vision Document

S&W and the leadership of the Zoo collaboratively created a white-paper "vision document" that identified and outlined the needs and opportunities of creating a new Zoo concept with a complete transformation of the visitor experience at its current location or a potential new location. The vision document outlined the significant capital investment that would be required for implementing this re-imagined vision for the Baton Rouge Zoo. The elements highlighted in the vision document included:

- Background about the Zoo – History & Success
- The Bold New Vision
- The Strategic Outcomes of a Transformation of the Zoo & Visitor Experience
- The Impacts on Baton Rouge
- The Funding/Business Model

The vision document is included in the body of the report starting on page 10.

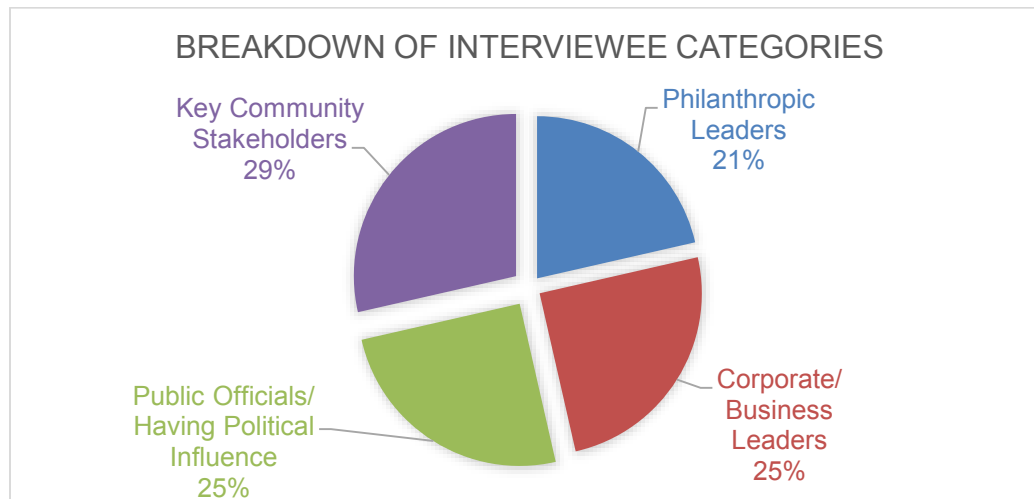
The vision document was used to engage community leaders in a discussion about the Baton Rouge Zoo and was sent by the Zoo with a cover letter from Phil Frost, BREC's

Baton Rouge Zoo Director, Jim McIlwain, President, Friends of the Baton Rouge Zoo Board of Directors, and Carolyn McKnight, BREC Superintendent. The document requested a one-on-one interview with a member of the S&W team. The list of potential interviewees was developed by a Task Force composed of FOZ, BREC and the Zoo leadership. The interview request letter is attached as **Appendix A**.

External Interviews

The Task Force invited over 40 business leaders, philanthropists, and community stakeholders to be interviewed with the intent that S&W would interview 25 individuals over the course of a three day visit to Baton Rouge. In March 2015, S&W Vice President Rick Biddle and S&W Consultant Jill Macauley conducted 28 confidential interviews – twenty-one were one-on-one in-person interviews with seven conducted via telephone interviews.

The interviewees were reflective of the following categories:



As reported by interviewees, about 30% were current or past Zoo members. A list of those interviewed can be found in **Appendix B**.

S&W developed an interview discussion guide to focus the conversations on key issues including:

- Image and awareness;
- BREC, FOZ Board and staff leadership;
- Strength of the vision and outlined outcomes/impacts of a transformation of the Zoo and visitor experience;
- Funding needed and timing of a public and private funding initiative and willingness of the community to support the vision; and
- Other factors that could impact the Zoo's ability to accomplish its vision.

Overview of BREC's Baton Rouge Zoo

History & Mission

The Zoo has a 45-year history of community support starting with a \$750,000 millage to start and build the Zoo in 1965. The community excitement was spurred on by the local celebrity Buckskin Bill. In 1970, BREC's Baton Rouge Zoo opened its doors at its current location.

From the beginning, the Zoo leadership has been dedicated to the highest standards in animal care and zoo operations. The Baton Rouge Zoo was the first zoo in Louisiana to achieve the distinguished honor of being accredited by the Association of Zoos and Aquariums (AZA). As a leader in the zoo field, the Baton Rouge Zoo was accredited in 1977, four years before any other zoos in the state and eight years before such accreditation was mandatory for membership in this prestigious professional association.

Today, the Zoo is now a top cultural attraction in the capital region attracting over a quarter million visitors annually. Beyond being a fun, safe, family-friendly experience, the Zoo has a clear mission to connect people with wildlife through its conservation and educational programs.

The Zoo is very active in conservation programs and fully participates with other zoos around the world in nearly 50 international Species Survival Plans (SSP) for critically endangered species. Three of these SSP animals, the Guam Rail, Arabian Oryx, and Golden Lion Tamarin, have been successfully reintroduced into the wild and represent living proof of the Zoo's long-term commitment of reintroduction to strengthen and supplement wild populations of endangered and threatened wildlife.

The Zoo conducts active outreach and in-house educational programs. These programs are aimed at making the public aware of the problems confronting wildlife of the world. The Zoo's educational programs reach thousands of children in school groups each year.

The Zoo has had a close partnership with the Louisiana State University School of Veterinary Medicine including a vet residency program that has trained a number of vets working for AZA institutions. A range of animal studies are also conducted through other departments at Louisiana State University as well as other colleges throughout the region.

Leadership

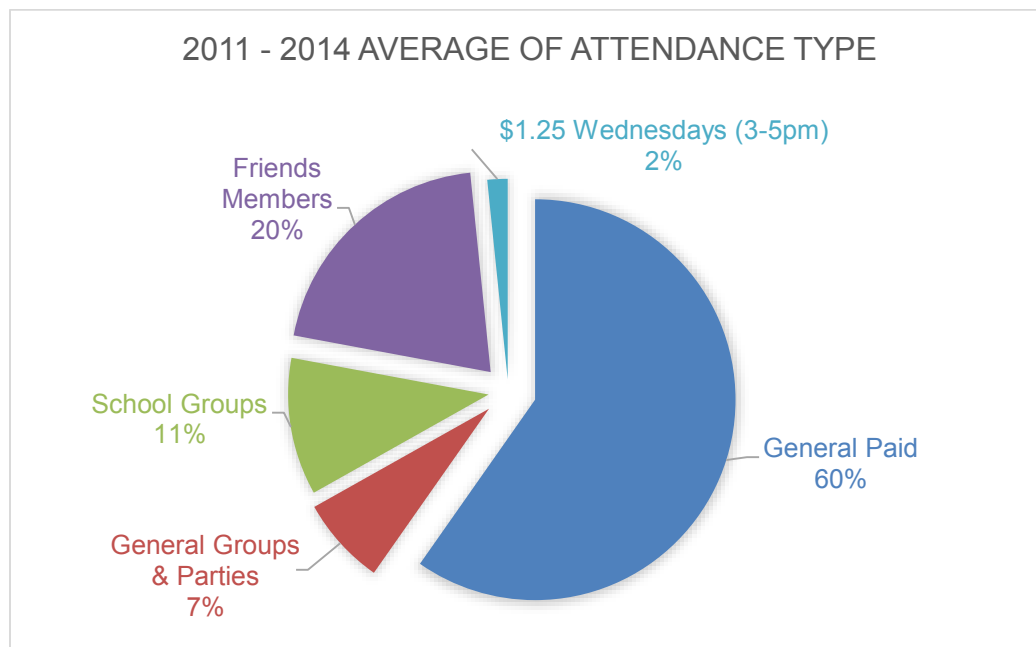
The Zoo is owned and operated by the Recreation and Park Commission for the Parish of East Baton Rouge (BREC), a public government agency. In 2011 the BREC Commission selected a new superintendent, Carolyn McKnight. Carolyn has vast experience in parks and recreation as she has worked for the Dallas Parks and Recreation department and helped to launch a new public-private partnership with the City and the new Dallas Zoo.

The Zoo is also supported by the Friends of the Baton Rouge Zoo, a 501(c)(3) not-for-profit organization. The Friends' mission is to support the Zoo and its programs. The Friends work closely with BREC to raise funds for capital projects, to increase attendance through events, and to promote community involvement. The Friends are managed by a Board of Directors that works in close partnership with the Zoo Director and BREC Superintendent.

The Zoo has had strong and steadfast leadership by its staff. Phil Frost, Zoo Director, has been leading the Zoo for over 17 years. Phil's career has included experiences at several other accredited zoos across the country and he serves on a number of influential boards in the conservation, zoological, state tourism and wildlife sectors.

Attendance

For the past four years after the opening the Zoo's last major renovation, the Realm of the Tiger, the Zoo has been averaging near 250,000 visitors annually.



The Zoo is a very affordable attraction in the community. It has kept its admission fees the same since 2012 and strives to be below the average zoo adult admission fee to best serve the residents of the Capital region. The current adult admission rate is \$8.25, which is well below the average adult admission fee of \$10.25 that is charged at similar sized AZA zoos based on total annual attendance. The Zoo does also offer a \$1.25 admission fee every Wednesday evening from 3:00 to 5:00pm to promote accessibility to all within the community.

Operating Model & Funding Composition

The Zoo operates under a successful public/private operating model with a balanced budget supported by earned revenues, contributed revenues from the Friends and community support through BREC tax initiatives. The Zoo has a \$5.5 million operating budget including the salaries and services that are provided by the East Baton Rouge Parish through BREC.

The following is the average breakdown of the Zoo's operating revenues:

- Earned and Contributed Revenue = 53%
- BREC Support & BREC Tax Revenue = 47%

The allocation is consistent with other AZA zoos of similar annual attendance and operating under a public/private partnership.

The AZA did an economic impact study of the Zoo. Based on employing over 100 employees, generating 250,000 visitors annually, and spending \$5 million on goods and services, the Baton Rouge Zoo contributes approximately \$17.67 million annually to the local economy.

Vision Whitepaper Document Tested in Interviews

S&W and the Zoo's leadership created the new vision statement for the Baton Rouge Zoo. The vision document was sent in advance to all confirmed interviewees. During the one-on-one interviews, the new vision was tested for interviewees' reactions to how compelling they found the concepts, how feasible they believe it was, and if they would support this new direction.

The Vision for the New Baton Rouge Zoo

Uniquely Baton Rouge—A Great, New Zoo for our Nine-Parish Area

The leadership of BREC's Baton Rouge Zoo has a vision to completely re-imagine the current Zoo through a transformation of the visitor experience into a zoological journey that offers our city, residents, families, visitors and guests a fun, unique zoo adventure.

The Zoo, Friends of the Baton Rouge Zoo Board of Directors, and BREC leadership are united and determined to give Baton Rouge the great zoo that it deserves, establishing it as a key cultural cornerstone of this growing and dynamic city. Our city should not settle for anything less.

Armed with the vision to provide Baton Rouge with a great zoo, one that is uniquely special for our city, much planning and consideration has gone into developing what hopes to be a complete transformation of the Zoo. Visitors will be engaged through interactive, highly-personalized wildlife experiences that are compelling and memorable.

Only a lucky few can afford to take a safari in the native lands of our animals, so we are bringing the experience to our community to discover, explore and connect with wildlife right here at Baton Rouge's new Zoo.

Baton Rouge's new Zoo will be the entertainment and educational destination for residents and tourists in the Baton Rouge region. Our region deserves a new and great zoo!

A Destination for All in and Around Baton Rouge

The new Baton Rouge Zoo will provide far more than an opportunity to view animals. The vision for the new Zoo, which is modeled after the leading zoo trends in the nation, is to offer fun, creative, immersive experiences that have the power to deliver a compelling message about preserving wildlife in wild places for a public that is increasingly isolated from nature.

This great, new Zoo will serve as a living classroom where visitors learn about real-life conservation and research programs – both at the Zoo and in the wild – through interactive engagement with keepers, docents and Zoo staff.

Conservation is an ever-changing need in our society. Educating our youth, families and elders will provide them with the tools and/or knowledge to help increase endangered species populations, decrease waste, conserve energy and make our world a better and safer place to live. The new Baton Rouge Zoo will continue to expand our role in community education and strive to serve as an educational hub from pre-school age to school age to those pursuing advanced degrees.

As a cornerstone of the new Zoo, the leadership plans to build a Conservation Learning Center, which will be the site for summer and holiday camps, overnight programs and school group activities. The Baton Rouge Zoo strongly believes in the philosophy of the African ecologist Baba Dioum:

“In the end we will conserve what we love, we will love only what we understand, and we will understand only what we are taught.”

Our New Zoo – A Whole New Adventure

The goal of the new Zoo experience is to take visitors through a multi-dimensional adventure to visit exhibits that are naturalistic and make visitors feel as if they have traveled into the wild. Learning from the trends among zoos today, the new Zoo's exhibit will connect the visitor to the animals through up-close perspectives and the opportunity to engage with the animals.

Imagine feeding a giraffe a lettuce snack, having a lemur jump next to you, or even having a bird land on your shoulder.

No longer will the Zoo visit be experienced just by foot – the wild and fun experience hopes to include:

- Ziplines and adventure courses;
- A train ride to take visitors behind the scenes;
- A bird's eye view of the animals riding a sky lift over the Zoo;
- Cooling off like elephants in wildlife-themed splash pads and water rides;
- A carousel made of endangered species; and,
- Other unique venues that give our visitors 360 degree views of wildlife.

Young children are curious and eager to learn about the natural world. Climbing, building, splashing, play-acting and daydreaming are fun and important for children's social, intellectual and physical well-being.

When children play and explore in nature, they become more vigorous, cooperative and imaginative learners.

The adventure will continue at the new Baton Rouge Zoo as the visitor dines and shops. As visitors dine, their tables will overlook exhibits to create the feeling of sharing a meal with an animal while introducing them to the highest levels of eco-friendly restaurant practices. The shopping adventure continues the experience, with the opportunity to share the culture of different lands while building on the conservation message of the surrounding exhibits and overall mission of the Zoo. The visitor amenities have an extraordinary opportunity to help teach how conservation and culture interact and affect the world we share.

A Wild, New Animal Exploration Experience

The zoological adventures at the new Zoo will offer a complete transformation for our visitors as they experience these key exhibits and experiences:

Life in the African Savanna – Elephants, Giraffes, Zebra, Rhino & Birds

A dramatic mixed-species exhibit built with rolling grasslands much like they would exist in the wild.

Elephant Oasis

Through the passion of our community, elephants have made their home in Baton Rouge for decades. Elephants are a flagship species for our Zoo; therefore, we are building them a brand new home. Specially designed for our elephants, this oasis will offer a stimulating, updated environment for the elephants by enhancing and expanding their habitat and enrichment. The Elephant Oasis provides wonderful viewing areas for visitors, where they can see the animals at rest and at play and participate in educational lectures and demonstrations.

Giraffe Encounters

With an African-themed feeding platform that reaches out into the African Savanna, visitors will not only be eye-to-eye with these mighty giants, but they will also be able to touch, feel and feed the giraffes.

An Asian Escape – Tigers, Primates, Antelope & Birds

As visitors travel throughout their new Zoo journey, they will be immersed in the sights and sounds of Asia and see a range of animals from small primates to different wild cats to many types of hooved animals. This exhibit will build on the culture and experiences in the currently accessible Realm of the Tiger.

The South American Cloud Forest Adventure – Jaguars, Bears, Primates, Birds & Other Small Mammals

Visitors to Baton Rouge's new Zoo can embark on an enchanting journey through the forests of Central and South America in this exhibit, which will be filled with fascinating creatures. The scenery will be set with dozens of unique, beautiful and interesting plants, trees and shrubs. Cloud forests are higher ground areas covered in moisture and mist. These "islands in the sky" are filled with several species that are not found anywhere else in the world. Visitors will have to keep their eyes and ears peeled for all the wild animals in the Cloud Forest.

Walk-Through, Free-Flight Aviary Experience

Visitors will be invited into a large walk-through exhibit which creates an experience unlike any other – an intimate, up-close interaction between visitors and free-flying birds, including opportunities to hand-feed and meet many species from around the world.

Wild Louisiana: Atchafalaya Basin – Cougars, Bobcats, Bears, Birds of Prey & Aquarium

The Atchafalaya Basin is the nation's largest river swamp, stretching across 14 parishes in south-central Louisiana. It is among the most culturally-rich and ecologically varied regions in the United States. In the nearly one million acres in the Basin area, it is the most active swamp/marsh ecosystem in the northern hemisphere. It is home to thousands of species of bird, fish, and animals. At the new Zoo, visitors can learn about this critical ecosystem and animals including the many endangered species in Baton Rouge's backyard.

Many more wildlife experiences are envisioned for the new Zoo, which will showcase animals from around the world.

As the facility master plan is developed for the new Zoo, every exhibit will be designed and built with our animals and guests in mind. Additionally, all exhibits will be built to meet, if not exceed, the Association of Zoos and Aquariums' (AZA) guidelines. These are standards the Baton Rouge Zoo has practiced and adhered to since 1977 when it became the first Zoo in Louisiana to gain accreditation and the 19th Zoo in the nation to achieve this distinction.

Supported by strong community partnerships, the new Baton Rouge Zoo will remain dedicated to being affordable, safe and accessible for all. As our Zoo is enhanced physically, careful consideration is made to design the Zoo to allow for easy navigation.

No longer is the Baton Rouge Zoo just a place for day-time visits. The Zoo offers businesses a progressive location for innovative corporate retreats. The new Zoo will be designed for fun-loving couples looking for a unique, memorable wedding venue. Additionally, zoos across the country are also creatively responding to the growing request to go beyond great group space by adding lodging that takes the experiences of the day into the overnight. Mission-driven designs of tents, lodges and more bolster the role of the Zoo as a tourist destination. As the vision for the new Baton Rouge Zoo is further developed through facility and business planning, lodging will be considered for the Zoo.

The collective leadership of the Baton Rouge Zoo feels it is critical that the new Zoo be created in close partnerships with our community. Strong support for the new Zoo to create synergistic relationships through partnerships with fellow cultural attractions, universities, corporations and government allows the Zoo to help generate a greater educational, conservation and economic impact for our region. The real value of the new Zoo will be in future synergistic relationships that will make it a true civic asset.

The Impact of a New Zoo

With our bold vision, leadership and partnership with BREC and the Friends of the Baton Rouge Zoo, we are poised to leverage the momentum created and enthusiastically embrace a vision of a zoological destination that is uniquely Baton Rouge with a fresh, compelling approach to wildlife experiences.

Baton Rouge's new Zoo will contribute to our region's future. Strengthened by synergistic relationships with our state, city, corporations and fellow organizations, this transformation will position the Zoo as a vibrant destination for generations of visitors, and enhance the quality of life in Baton Rouge through education and tourism.

Once completed, the new Zoo will attract over 375,000 estimated visitors annually; generate over \$10 million annually from its operating programs; leverage an estimated \$24 million in annual economic benefits; and generate over \$330 million in one-time economic benefits from its facility investments to create the new vision.

\$110 Million Investment Together as a Community

Just as we have turned to the community in the past to help us expand and improve, we will once again look for the support of our communities to make this grand vision a reality. BREC will not only have to explore the need for a new funding initiative, but will also look at all public stakeholders including East Baton Rouge Parish/City of Baton Rouge and the State of Louisiana.

In an effort to leverage public support, the Zoo strives to raise \$25 million in private support in order to complete this transformation. We hope that individuals, foundations and businesses will once again invest in the Zoo's growth as a way of supporting animal conservation and the cultural and recreational life of the Baton Rouge region.

A most ambitious vision, this transformation of the Baton Rouge Zoo will bring together best practices in animal management, naturalistic environments, visitor engagement and public education. Baton Rouge's new Zoo represents the significant commitment to Baton Rouge as a center for conservation and public education excellence. Best of all, it will engage hundreds of thousands of visitors in a compelling and memorable wildlife experience – one that is uniquely Baton Rouge.

Summary of Findings

The following is a summary of our findings from conducting 28 one-one-one interviews with community stakeholders, public officials, corporate/business leaders and philanthropic leaders. The twenty-one in-person and seven telephone interviews lasted between 45 and 60 minutes on average. All but six interviewees read the vision document in advance of the interview. Each interview began with an introduction to the process and overview of the vision (this was more detailed for those who had not read the vision in advance). A discussion guide was used to facilitate the conversation, but was not shared with the interviewee.

Image & Awareness of Zoo

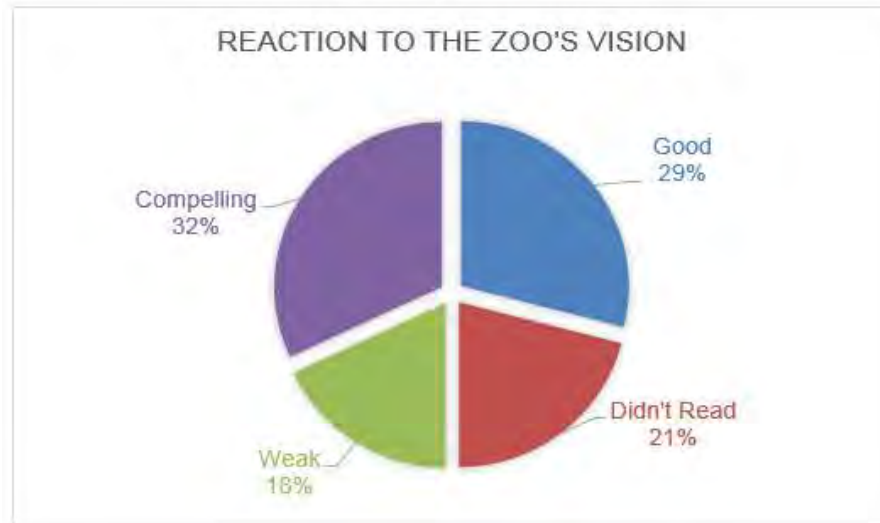
- The majority of interviewees were not regular Zoo goers as about 30% of interviewees had visited the Zoo within the year with nearly half of the interviewees having been to the Zoo within the past five years.
- Interviewees who spoke to their recent visit and experience shared that they had an average to positive experience at the Zoo.
 - *"I do think of a zoo as a community asset. I believe wholeheartedly in learning through exposure. It is important for children to be exposed to wildlife, especially if we want them to be advocates for conservation. I also appreciate the family time that a zoo offers. Our Zoo is more affordable than people think."*
 - *"I like the Zoo. The people are nice but it is obvious that the Zoo needs repairs and renovations. I feel like it really needs to be brought up to speed. The really great thing about the Zoo as it is today is it is spacious."*
- The perception of the Zoo in the community seems to be as a place for parents and young children. The Zoo is not perceived to attract a wider range of audiences.
 - *"I know that kids love our Zoo, but it has nothing for adults without children."*
 - *"I think other BREC parks are more popular. The Zoo is only relevant to parents with young children."*
- Over half the interviews revealed that the Zoo is perceived to be an older, dated facility in need of upgrades. The interviewees shared that they thought the community is aware that other zoos both regionally and nationally have more engaging experiences and higher quality exhibits.
 - *"I have enjoyed my experiences but it hasn't changed since I was a kid. I would describe the Zoo as stale, old, small and in a bad location. The*

Zoo location, unfortunately, is not where Baton Rouge has grown with the exception of Zachary."

- *"I love zoos, but our Zoo is in need of help. As it exists today, it is a place that has not caught up with times."*
- Some interviewees called the Zoo the "Baker Zoo" as it is near the beginning of the Baker city limits, and many commented that they felt it was not in a convenient location.
- In general, the interviewees felt that the Audubon Zoo in New Orleans had greater awareness and was perceived to offer more robust visitor experiences to the residents of the Baton Rouge region. Interviewees were aware that, with the recent marketing of Audubon Alive, there had been significant awareness building of the Audubon Zoo in the Baton Rouge region and among a percentage of New Orleans residents that have moved into South Baton Rouge after the hurricane in 2005; therefore, there is a heightened awareness of the Audubon Zoo.
 - *I guess I would call [our Zoo] adequate. The Audubon Zoo is much better and if you have been to Audubon, your perception of the Baker Zoo is tainted."*
 - *"While I have not been, I have heard that it is below average. We are actually members of the Audubon Zoo."*
- When asked about the role that a zoo can play in a community beyond serving as entertainment for young families, the majority of the interviewees had not thought of the Zoo as a larger community asset related to education, conservation, quality of life, economic development and synergistic partnerships.

Response to the Vision Document

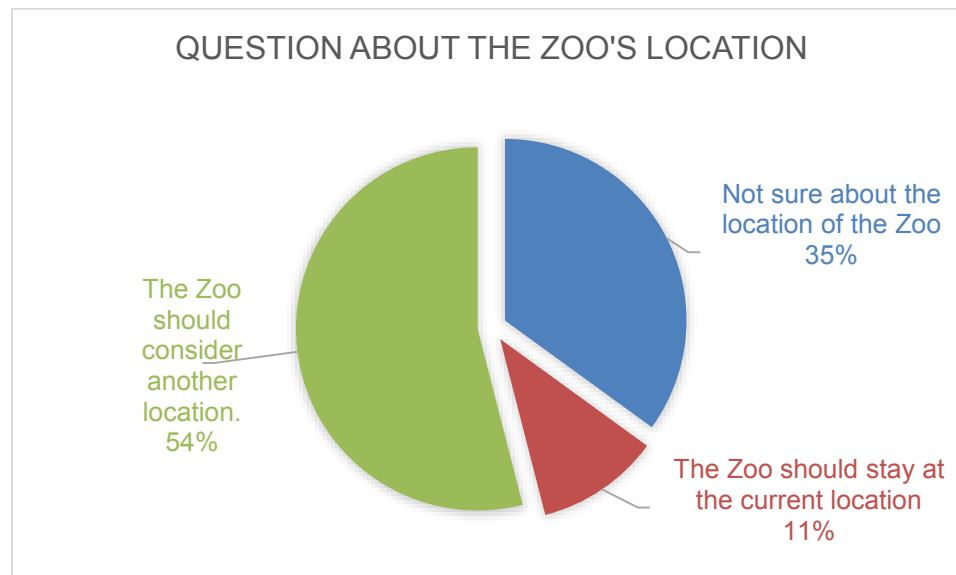
- Interviewees' reaction to the vision for a transformation of the Zoo and the visitor experience as outlined was as follows:



- *"Let me be clear – I love this idea."*
- *"The Zoo has laid out a really compelling vision. I am very impressed; this is what the City should have."*
- *"I am so glad to see the Zoo thinking bigger than elephants. I love how the vision was based on the leading zoos, but has Louisiana elements."*
- *"I am a believer in all that a great zoo provides to a community. Zoos are great amenities for communities. Yet, we have Audubon and I am not sure that Baton Rouge needs it."*
- *"Transforming the Zoo is an important story to tell. They will not be the same old Zoo; that is something that BR needs."*
- Interviewees responded optimistically to being asked if they felt there would be interest and willingness within the community to support the new vision. Over 80% of interviewees felt that there was high probability of the community supporting the vision.
 - As interviewees learned more about the vision during the interview discussion their excitement about the vision increased. Of those who didn't read the case (6 interviewees) all but one agreed that the vision was good to compelling.
 - *"Initially, I would just have said no it is not possible to get the community support. As we talk, I am thinking this could be really impactful for our community but it has to be done right with the right people, right focus and right relationships."*

- *“BR is a healthy community and will support this. Yes, there are lots of needs but a zoo is an important element/fabric of a dynamic community. Right now, the only other option/alternative for children in BR would be the new Children’s Museum – the Zoo is for families and children so, yes, it is important.”*
- The main concern of interviewees was about the competition for funding in light of many critical needs in Baton Rouge such as education and healthcare. As noted later in the findings, 81% of interviewees felt it was potentially possible to raise the needed funds for the Zoo’s vision.
 - *“The timing of this project is important. Where does this fall in the community’s priorities? I would think that it is a high priority with the right leadership.”*
 - *“I question is if the Zoo is a priority for the community right now. There are a lot of competing needs such as education, traffic infrastructure, developing the downtown and other cultural funding needs like Knock Knock.”*
 - *“I do believe the community would come to a zoo that is like what is described in the document but I don’t know if they will support a tax initiative or if the bandwidth is there for that much private support.”*
- The interviewees found the following elements of the vision to be compelling:
 - Baton Rouge is a city on the rise and people want it to become known as a great city. A great city deserves a great zoo.
 - *“It is too often that Baton Rouge settles for just so-so and says it doesn’t matter we will never be New Orleans. I want to see Baton Rouge go beyond that and have a big vision.”*
 - *“I think that every cool community has a great zoo. The Zoo needs to explain its role in our community.”*
 - Interviewees were very excited about the potential transformation of the Zoo offering a new level of big and bold animal and visitor concepts that are highly interactive and engaging.
 - In a region with great natural habitats and wild spaces, the Zoo should continue to create awareness and education about conservation both locally and globally.
 - *“I would recommend that it really highlight the local species and local conservation to help people learn about their backyard. Doing that helps the Zoo create a more significant place in our cultural heritage. The new Zoo can make the Baton Rouge Zoo a true asset for our state.”*

- *“Connection to education and learning are key and critical. It is important to promote the tremendous learning opportunities that the Zoo would offer.”*
- The vision explains how the Zoo will develop and foster relationships with colleges and universities, conservation organizations/projects including the Water Institute and educational organizations to help enhance the overall impact through synergistic partnerships. Interviewees liked how the vision outlined concepts that took the Zoo to being “more than a zoo”.
 - *“It will be important to link the Zoo’s role in the community to economic impact. People want to understand how it will relate to other sectors like education, LSU, development and tourism.”*
 - *“Having a partnership with LSU is a great idea. It adds credibility, adds students to its audiences and offers opportunities for students from education, vet tech, vet services, hospitality; business practices and intelligence to use the Zoo as a living classroom.”*
 - *“In particular having partnerships with places like the Water Institute will be very popular. The new Zoo really needs to communicate how it is linked to the community through partnerships.”*
- Interviewees were asked if the current location allows the Zoo to best serve the community. The following is a breakdown of their responses:



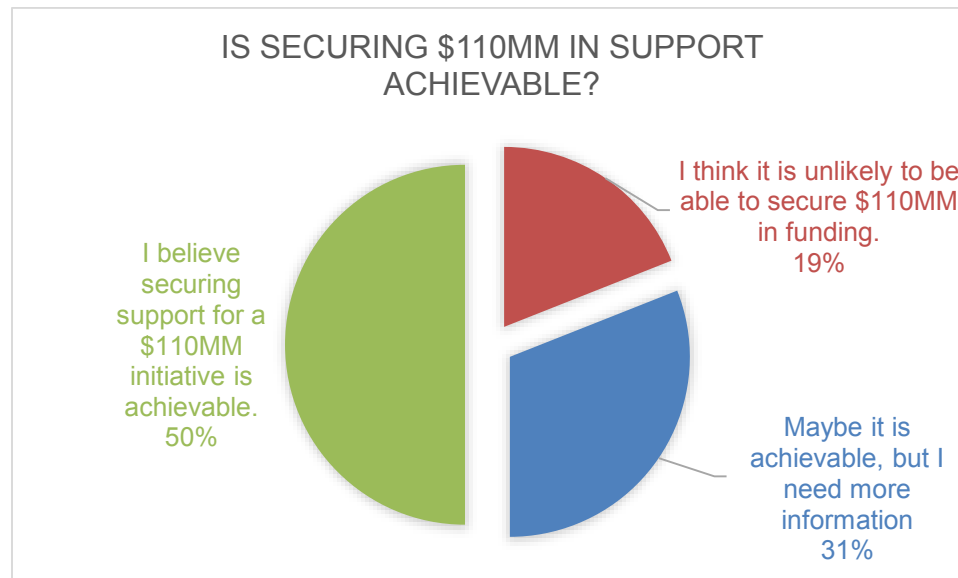
- 54% of interviewees thought the Zoo should consider another location. They also felt strongly that the Zoo needs to have a detailed business plan that outlines the full impact of the capital investment and its sustainability. The 35% of interviewees that were not sure said they

would need more information to make that decision. Only 11% of interviewees said that the Zoo should not move.

- Many interviewees valued the idea of the Zoo developing greater partnerships with other organizations in the region and believed that a more central location would be critical to developing those relationships.
 - *“I do not think that the current location of the Zoo allows it to best serve the community. Yes, I think if we are going to invest we should move the Zoo. I am not sure about the ideal location, but it should be centrally located. As I read the document, I thought to myself about the Zoo needing a new location. Let’s think about a fresh start. It would be great to truly create a destination linked with other museums or conservation projects like the Lakes Project.”*
 - *“I think you need to move the Zoo from its current location to fulfill this big vision. The Zoo needs to be in a different location to create important relationships with the community. Leveraging those relationships is important in creating this new Zoo and for sustainability.”*
 - *“I like the idea of the Zoo being centrally located. If it were closer to LSU, there would be potential for much more expansive partnership.”*
 - *“Baker is not the right location. Being all the way up there, I don’t think it is even thought of as the Baton Rouge Zoo. I call it the Baker Zoo. The biggest reason it would need to move is because of linking it with the educational programs. I would love to see a school at the Zoo and that can’t happen in Baker.”*
- Interviewees did share that their support and investment would likely increase significantly if the Zoo were to relocate to a more central location.
- Interviewees that were concerned about the proximity of the Baton Rouge Zoo to the Audubon Zoo were not aware of the large number of successful models of two zoos being within 75 miles of each other: Seattle/Tacoma, Dallas/Fort Worth, Detroit/Toledo, Orlando/Sanford/Melbourne, and many others.
- Based on interviewee responses, the general consensus is for the Zoo to continue to assess site and location options to best serve the community.

Funding Potential

- 50% of interviewees believed that raising \$110MM through multiple funding sources is achievable, 31% said maybe, but they needed additional information related to leadership and timing, and 19% (5 interviewees) thought it would be unlikely. The breakdown of interviewee responses on the funding potential is the following:



- Interviewees felt good about BREC's reputation and involvement as it builds confidence and support for the project.
 - "BREC does have a wonderful reputation in this town. They have done good work and maybe leveraging BREC will help the Zoo get the funding."
 - "BREC has a great track record. It would appear doable."
- Interviewees did think that raising the private funds first and then asking the voters to pass a new tax initiative was the better strategy. There were several interviewees that recognized that the timing and sequencing of the funding requests from the different sources would have to be very strategic.
 - "I do think it is possible, but many factors would impact that. I think the \$25MM needs to be raised privately first."
- Interviewees felt strongly that, if the Zoo engaged the right people and leadership to lead this project in the community, the likelihood of the project's success increases significantly.
 - "This is a big number. All of the right people need to be involved from the ground floor to make this become a reality. The Zoo needs to engage those key influential community leaders."

- *"It is possible, but it could be challenging. They need the right leadership involved."*
- Interviewees shared that they knew of competition for private funds for other major capital projects and that the Zoo needs to be aware of this as it begins to fundraise.
 - *"We are raising \$300MM for a Catholic hospital (Our Lady of the Lake Hospital). Phasing this project is an important strategy."*
 - *"It might be doable. There is competition right now for funding with the Lakes Project and Children's Hospital."*
- Interviewees had the following feelings about successfully passing a BREC tax initiative:
 - Interviewees felt that BREC has a great reputation, which will be able to be leveraged to build tax payer support.
 - *"BREC has a great reputation and has been a good steward of the public funding they have received. I would recommend that part of the messaging focus on being transparent and helping the people understand exactly how this will impact them (i.e. \$2 per month)."*
 - *"BREC is beloved in the community, which will help get a vote passed."*
 - Interviewees feel that significant investment will need to be made in gathering community input prior to vote and clear, consistent detailed messaging will be needed.
 - *"It will be critical to have private support first. I would think that the Zoo needs to make a significant investment in parish surveys before going out for a vote. Also BREC is viewed as having money, which might also challenge getting the support."*
 - *"I think the philanthropic dollars would have to be raised first."*
 - Ten of the interviewees were also concerned about the tax-adverse nature of the community and the community's track record with not passing other initiatives.
 - *"It will be very difficult to get another tax initiative passed. People will have to be convinced of the value of the Zoo. Right now, people do not value the Zoo enough to pay more taxes for it."*
 - *"There are members of our community that are very much against any tax initiative. I would think it could pass. BREC would have to demonstrate the business plan and sustainability of the*

project and be very upfront about if additional tax initiatives would be needed for operations.”

- Interviewees were generally not optimistic about securing either State or City funding. The two ways interviewees saw opportunities to secure public funds was after new administrations at both the State and City levels were in place and through partnerships with education, universities, Department of Wildlife and Fisheries and tourism. All agree that “timing” would be critical to successfully obtain funding from the State and the City.
- The majority of interviewees felt that raising \$25MM privately would be the linchpin to the success of the project and would have to be done before the tax initiative and other public dollars could be secured. The majority of interviewees felt it was possible to achieve the funding goal, but that was contingent on engaging the right leadership, identifying lead seven-figure donors and promoting the project’s big and bold vision.
 - *“My response is “yes, [to raising the private dollars] but...”. Raising this type of money will require the right people to be involved and having them lead the bandwagon.”*
 - *“I’m not sure. That is a big number but it is also a big compelling vision. Again, with the right leadership behind this, it could be done, especially if it is done in phases.”*
 - *“We have seen organizations struggle to raise half that amount, but then others raise that easily. Yet, the only way people will invest is if this Zoo is completely different from the Zoo experience of today.”*

Cultivating Constituencies

- The interviewees had the following thoughts on what cultivation and messaging would be needed to secure the public’s support for this project:
 - The awareness of the Zoo in the community will need to be higher. The Zoo will need to invest in making itself top-of-mind in the community by taking its message on the road, creating a larger presence at other community events and greater marketing about its role, especially in education and conservation.
 - *“I am personally ignorant about the role that a Zoo can play in a community. I know I would need more understanding about our Zoo and what it could be. Therefore, I would think that the Zoo needs a campaign to educate the community before doing anything else.”*
 - *“The Zoo needs to go on the road and give it a face in the community. The awareness is so low about our Zoo. Then, the Zoo really needs to spend significant time working with the public*

on getting their input and thoughts about its future. The Zoo has to do more to create a relationship with the community than just put up billboards.”

- The message about the big, bold vision and the project has to be clear, consistent and transparent from the beginning. The community will want to know that there has been significant investment made in gathering their input.
 - *“People need to have confidence that their experience is going to jump from C level experience to an A level experience.”*
 - *“BREC needs a compelling business plan for the new Zoo. Where is the best location that provides the highest return? What does the Zoo become? What does this community get from a \$110MM investment?”*
- The community will need to have how the new transformed Zoo is critical for Baton Rouge clearly explained. It will be important that they understand how it enhances the quality of life for the region and is linked to economic development. It will also have to be clear in how the new Zoo is linked to promoting and enhancing educational efforts in the region.
 - *“We are the capital city of Louisiana for goodness sake. It is time that we started investing and making our city great. The investment in the Zoo should be spun to show it is a civic initiative.”*
 - *“It will be very important that the message is more than ‘this is just the right thing to do’. We need to explain why this is a priority to our city.”*
- The vision must also differentiate Baton Rouge’s new Zoo from Audubon Zoo and highlight how the new Zoo is uniquely Baton Rouge.
 - *“It will be important that the Zoo is leveraging education, conservation, entertainment and hospitality, but not duplicating what we already have in Baton Rouge or what is in New Orleans. Collaboration is the key.”*
 - *“If people see this as the same as what is in Audubon, they will not support it.”*
- Voters will be looking for a clear understanding on how the tax money will be used and how the Zoo will have a sustainable operating model.
 - *“The Alive concept was not good. That could still be a negative if this new initiative that is BR-driven is not properly communicated.”*

- *“It will be very important for clear, consistent and transparent messaging.”*
- The interviewees had the following thoughts on what cultivation and messaging would be needed to make the Zoo a greater philanthropic priority and allow the Zoo to raise at least \$25MM in private contributions:
 - The Zoo will need to build awareness in the philanthropic community because most donors do not have a relationship with the Zoo. Having the right leaders involved with the Zoo will be key in creating the excitement about the vision and confidence in the project.
 - *“The right leadership is key to making this a priority in the donor community.”*
 - *“There is a lot of wealth in this community and the wealth continues. There is a lot of competition for major donors. I am not sure any of the key donors in this town have an affinity for the Zoo; therefore, there would need to be a lot of work to build that affinity before they could start soliciting.”*
 - Major donors look for projects that leverage their impact; therefore, the partnerships the Zoo develops will be critical. Donors will be looking for the Zoo to be linked to the community on a larger scale including expanding their partnership with LSU. This is also critical because there are several major needs and projects such as the Lakes Project and Water Institute.
 - *“The Zoo needs more visibility. That visibility will help make it a greater priority. I would recommend that the Zoo work really hard to find and secure the right partners. The Zoo needs to be integrated through partnerships and perhaps location with the Baton Rouge urban development plan. I would think that LSU is a smart way to go in terms of partners. I would also link the Zoo to the animal shelter.”*
 - *“People need to understand how the Zoo is linked with the community on a larger scale.”*
 - *“The key pieces to getting funding for the Zoo would be partnerships with the right organizations, especially the school districts and relating the Zoo’s educational mission to STEM/STEAM and the local curriculum.”*
 - Major donors will be looking for a viable and sustainable business plan to understand ensure their gift will continue on for years to come.
 - *“Major donors will need to know the measurable impacts and expectations of the results of having a new Zoo in Baton Rouge. They will need to better understand the economic impact. The Zoo will need to have a business model that it is net positive or*

at least net neutral. Partnerships will be viewed as very important to funders.”

- *“People want to know this new Zoo will be sustainable.”*
- Major donors will desire understanding about the location and want to ensure that the Zoo will be investing in the right location. There was clear sentiment from interviewees that they were unlikely to support the project at the same level if the Zoo remained at its current location. They would be more likely to make significant investments if the Zoo were to find a more central location to better serve the community and more likely to secure synergistic partnerships.
 - *“If it remains at the current location, there will be no support. If it is moved south of the City and offers a bold concept, we will support it and bring new/additional dollars to the table in support of this initiative.”*
 - *“The location will affect the level of support and I think many will agree that they don’t want to support it in the current location.”*

Leadership

- BREC is a respected resource as its public park and recreation facilities and programs throughout East Baton Rouge Parish are highly utilized and valued. BREC also has a good reputation with voters because of its dedication to staying true to its promises and completing projects on budget and on time.
 - *“BREC gets high marks for quality and has a strong name recognition/awareness in the community.”*
 - *“BREC is known for an “on time; on budget” philosophy.”*
- Carolyn McKnight, BREC’s Superintendent, while relatively new to Baton Rouge has successfully become known in the community and has a positive perception. Interviewees that know Carolyn feel strongly that she is asset to BREC, a good leader and has successfully engaged with the community.
 - *“Carolyn is a good listener; she is a leader. She is the reason that I am involved with other organizations.”*
- Those who know Phil Frost speak to his knowledge as a zoo-industry and management expert and his ability to engage people in learning about the Zoo.
 - *“Phil did get me excited with the new ideas he has for the Zoo. He did a good job selling it.”*

- The Friends of the Zoo Board of Directors is made up of members both known and unknown in the community. Interviewees that felt they could speak to the Board members' ability to lead the Zoo through a major transformation felt that additional high-profile philanthropic leaders and community leaders would be needed to make the vision a reality. The interviewees saw this project as a growth opportunity for the Board.
 - *"I know a handful of members, but the Zoo really needs to build a Board with the next generation of big thinkers. The Board needs to own the big, bold new vision for the Zoo and be the spokespersons for it."*
 - *"The Board would need to be strengthened to lead this transformation."*

Recommendations

Based on our interview findings, our discussions to date and our experience with working with leading zoological and cultural institutions, Schultz & Williams recommends that Friends of the Baton Rouge Zoo move forward with the next steps outlined below for implementing its vision for the Baton Rouge Zoo. This feasibility study shows a willingness to support the vision for a transformation of the Baton Rouge Zoo and the visitor experience.

We believe it is important to recognize that this study should be seen as the start of the conversation with the community. There will be significant work that will require completion including conceptual facility master planning to further refine the vision of the Zoo; analyzing the best site location and land use; gaining additional community input; and building awareness of the Zoo in the community before the Zoo can really begin seeking funding. As planning relates to the Zoo's location, a land donation could heavily influence a decision to relocate the Zoo; it would also help to secure both philanthropic contributions and support for the BREC initiative.

In light of the planning work that needs to be done, the key factors critical for successfully moving this initiative forward include developing:

- Influential and willing volunteer leadership;
- Greater awareness and understanding about the role of the Zoo and its impact on the community;
- A clear and bold vision backed by a compelling case for support;
- A cultivated constituency and the willingness of that constituency to contribute; and,
- Staffing and infrastructure to support a community-wide cultivation and a major fundraising effort.

We were very pleased to see the excitement that the feasibility study generated both during the interviews and in follow-up conversations. With the momentum generated about the Zoo's vision, we recommend strongly that the Friends of the Zoo Board of Directors leverage the momentum by engaging actively in more planning and continue proactive engagement with the community's leadership.

Below are our recommendations on how to continue to move the process forward to make the Zoo's vision to completely reimagine the Zoo and the visitor experience a reality.

1. Leadership Identification & Cultivation

The feedback gathered from interviewees had a very consistent theme around leadership. The consensus from interviewees was that the success of this initiative centered around having the right individuals involved and engaged in leading the implementation of the new vision.

With the size and scope of this project, our recommendation is that the Zoo look to develop a leadership group to serve as a dedicated force in addition to the current Friends of the Zoo Board of Directors. We recommend the Zoo identify five to eight of the most influential community and philanthropic leaders to guide this initiative and be engaged with the Zoo to form the “Steering Committee”. The Steering Committee, comprised of “the five to eight stakeholders” should be highly visible, highly respected leaders in the community that have a history of engaging others with major community projects. The individuals recruited to be part of the Steering Committee should be involved from the early stages of planning to ensure complete buy-in, which will help develop them into active advocates for the project, especially when this bold new project begins its fundraising phases. We suggest one or two FOZ Board members be included in the Steering Committee to serve as a liaison to the Board. The Steering Committee should be managed by and report to the Zoo Director/Executive Director of the Friends, Phil Frost.

Additional sub-committees could be developed as the project develops and as appropriate to work on selected elements of community engagement (i.e. gaining political support, gaining neighborhood/parish support, building relationships with universities and educational organizations, building relationships with conservation organizations, and building relationships with the tourism industry).

Volunteer leadership will need clear job responsibilities, talking points, communication and marketing collateral, regular contact, clearly assigned tasks and staff follow up on their tasks and ongoing support and resources. It is important to note that even the best committees don't drive their own activity; they must be strategically led by Zoo leadership and staff.

While, we are recommending that a project Steering Committee be formed to lead this project, the Friends of the Zoo Board must be active supporters and advocates. The Board will need to be viewed as 100% behind the Zoo's vision both philosophically and financially.

In brief, the responsibilities of the Board should be as follows:

- Serve as ambassadors for the Zoo and the project.
- Give generously based on individual means.
- Help identify potential donors.
- Participate in cultivation events.
- Be involved in solicitations as appropriate.

- Report on competing funding projects in the community.

It is important that the Board be trained on how to help manage and implement this project, kept abreast of the Steering Committee work and be given message points on how to share the Zoo's vision with the community.

Continually, the Board and staff should be looking for new Board and Steering Committee prospects. Annually, evaluation by the appropriate Board committee of the skills and abilities of the Board members will help to maintain the energy and effectiveness of the Board as a whole.

2. Vision Development & Master Planning

The vision for the transformation of the Zoo and visitor experience was strongly supported by the feasibility study. As interviewees engaged in the conversations during the interview, over 80% of the interviewees became increasingly excited. Most of the interviews ended with interviewees expressing the desire for the Zoo to continue planning and working towards its new vision.

This study was executed in a format that presented a vision that was just a preliminary explanation of what might be imagined. Now, the Zoo needs to engage a Zoo architectural and planning firm to develop and formalize a detailed facility concept plan around the new vision with input from the Steering Committee.

The following are the key next steps in planning:

- Engage a zoo architect in a planning charrette to develop a concept master plan that is not site specific to illustrate the new vision of the Zoo. This process should be completed in less than three months. This illustrative plan will serve as an important tool in helping the Zoo further promote its vision and help community leaders visualize what a transformation in the Zoo means.
 - We would recommend gathering benchmarking data about other successful models with two zoos within 75 miles and use this data to help explain how the new Baton Rouge Zoo will be uniquely Baton Rouge and enhance the entire southern Louisiana region.
- The Zoo should develop and refine the strategic business plan and estimated economic impact of the transformed Zoo. The business plan will be critical in creating confidence in both the private and public communities about the viability and sustainability of the Zoo.
- Strategically identify a list of potential partners that create "synergy" for both the Zoo and its potential partners as interviewees were passionate about the new Zoo's need to play a larger role in the community and have a larger impact through partnerships. The Zoo leadership should work to schedule opportunities to introduce the Zoo, its mission, current work and its vision to these organizations. The Zoo should also seek to learn from these potential partners what their visions are and how to share in common goals. Ideally, the Zoo and

the potential partners will identify opportunities to align their efforts and create partnerships that helps achieve their share goals and vision.

- The interviewees suggested partners including LSU and other local universities, Water Campus, Water Institute of the Gulf, Baton Rouge Chamber of Commerce and other chambers, Visit Baton Rouge, tourism and hospitality industry leaders, Superintendent of Education, school districts and the Knock Knock Children's Museum.
- To help build the case for the vision, the Zoo needs to begin much more thorough data collection about its current visitors. With a better understanding of who currently visits to the Zoo and why, the Zoo can enhance the messaging about the impact and need for the transformation. The Zoo should immediately start collecting additional data on its visitors such a zip codes, length of stay, visitor satisfaction and visitor experiences. At least quarterly and annual analysis should be done of the data collected.
- We recommend and interviewees agreed that the Zoo should prioritize engaging the community leadership in more conversations about the vision, the planning charrette(s) and actively meet with potential partners before addressing the question about location further. The consensus from interviewees is if the Zoo was to start with a blank canvas, the current location was not likely to be selected as the best site to build a zoo. Interviewees were also direct in sharing that it is likely that they would increase their philanthropic support towards this project if the Zoo were to be in a more central location that would it allow to be more accessible to the population and to building synergistic partnerships. They were less inclined to support the project at a significant level at the Zoo's current location.

It will be critical to have a clearer understanding of what the community leadership would support and what synergistic partnerships could have the greatest impact on the region before committing to a specific location.

- The Steering Committee should continue to engage their peers in conversations about the Zoos location as well as gain a better understanding of what other potential locations could be available.
- Through the Zoo's visitor surveys, questions could be asked about the Zoo's location to collect their input.
- Again as planning continues, the business plan should be further developed and detailed. Based on our experience, the cost of building a new Zoo on undeveloped land compared to renovating the existing Zoo will be very similar – minus the cost of land. There is concern from interviewees about having purchase land, especially having to use public funds to do so. There is less of concern if the potential new site/land is donated to the Zoo.
- If the decision is made eventually that the Zoo would be able to best serve the community in another location, then the Zoo leadership along

with BREC's leadership would have to work diligently to engage the communities surrounding the Zoo and create a strategic plan for the space in Greenwood Community Park that the Zoo currently occupies.

- We believe that if the Zoo follows the planning timeline outlined in this report, the Zoo can answer questions about the location within the next six to nine months.
- We would recommend the Zoo work with the community leadership and potential partnerships take place before engaging the general public in focus groups, town meetings and polling. We would envision that the initial market research and general community input would focus on the larger vision and asking the community how the Zoo can better serve them. As planning progresses and the Zoo has clearer options related to the location, then the Zoo should engage in town meetings and polling related to the larger vision and the location. There will have to be careful coordination of the public engagement and collection of their input in the planning.
- When the vision has more depth, partnerships are developed or in the works and the business plan is more solidified then the Zoo should begin preparing for raising the private support needed through a capital campaign. We believe that raising the private dollars first will be critical for creating confidence and support in voters to pass a tax initiative. The Zoo will need to create a campaign plan that prioritizes donor outreach, creates prospect management strategies and organizes volunteers and staff to engage in cultivation and solicitation. Formal campaign case statements and materials will be needed as well.

3. Funding the New Vision

The interviewees felt that the success of the Zoo's new vision would be most likely be achieved through a public/private funding model. Public/private models in the zoo industry have been very successful. There have been a number of recent successful major initiatives supported in conjunction with major private fundraising campaigns including Birmingham Zoo (Birmingham, AL), Utah's Hogle Zoo (Salt Lake City, UT), Houston Zoo (Houston, TX) and Dallas Zoo (Dallas, TX).

Unlike the Audubon Alive initiative which was going to rely primarily on public support, the interviewees felt strongly that the likelihood of success would be increased by first securing private funds before asking for the voters' support and soliciting public dollars. By sequencing the model with private dollars first, the community leadership will have an opportunity to demonstrate their commitment to the project and for the Zoo to spend time increasing its awareness in the community.

In our testing of the feasibility of raising \$25 million privately, the interviewees believed that with a bold vision and the right leadership this is achievable and possibly additional private support could be identified.

Interviewees understood that the \$110 million discussed in the vision document was an initial estimate. With the Zoo's leadership and the Steering Committee input, the Zoo will work to solidify the transformed Zoo's facility and concept plan, refine the scope of the vision and secure detailed cost estimates. The funding model will have to be reevaluated as planning progresses and a more informed funding structure will be developed. In all cases, the vision for the transformation of the Zoo and visitor experience can be accomplished with a phased funding approach.

4. Internal Capacity

The Zoo and Friends are young organizations in terms of raising capital funds from individuals, foundations and corporations. While it has successfully completed smaller capital campaigns, the Zoo will need to increase internal capacity to raise the private dollars necessary for accomplishing its vision. The operational foundation of a development program – from staff capabilities to policies and procedures to systems – is critical to ensuring that the right prospects are reached with the appropriate messages to support any engagement/cultivation effort, and that relationships deepen community engagement over time.

The Zoo Director will need to allocate over 70% of his time to this project and building relationships. It is vital that his duties in Zoo operations will need to be delegated to his staff. He will need to meet with community leaders and partners on a weekly, if not daily basis. He will also need to work with the zoo-industry experts to guide the planning for the Zoo including the master planning and business planning. He will also be overseeing the Steering Committee.

Currently, the Zoo has one individual overseeing development, membership and marketing. (This position is not a BREC employee, but a Friends of the Zoo employee.) This will need to be expanded to address increased awareness building and volunteer management. We would imagine that an external marketing/public relations partner could be used to increase the bandwidth in awareness building, communications, and media relations. It will be an increasingly larger job to manage the volunteer leadership of the Steering Committee as more and more cultivation and outreach occurs to build the prospect pool for the Zoo. Additional major gifts officers will be needed to support a capital campaign of \$25 million. Staff and/or contract resources will also be needed for donor prospect research, market research/polling, cultivation/engagement events and campaign management.

One of the most critical tools to building organizational capacity will be having a manageable and efficient database system. All identified prospects and prospect activity will need to be entered, tracked and managed through a database. The Zoo should evaluate its current system and staff expertise and resources that are managing it. If needed, the Zoo should invest in enhancing its database and building the resources needed to maintain it.

5. Zoo Awareness Building

From our experience, an organization becoming a priority in the community requires awareness, a compelling vision or story to tell and leadership. Communities rally behind and support much more passionately and generously around institutions that are top-of-mind.

As we learned in the interviews, the Zoo needs to generate more awareness, especially as it relates to the larger role that the Baton Rouge Zoo can play in the community.

Currently, the Zoo is viewed as place for young parents to take their children – a very linear view. The Zoo needs to expand how its new vision is to diversify the visitor experience making the Zoo a place for all ages. This is related to the Zoo having a more synergistic role in the community linking it to education, conservation, quality of life, tourism and economic development.

With the significant investment made recently by the Audubon Alive initiative, the general community does have some understanding about how zoos are expanding their impact in their region. The Baton Rouge Zoo needs to create that top-of-mind awareness about it and its new vision. Most importantly, the Baton Rouge Zoo needs to do this in a way that highlights how its vision is unique for Baton Rouge and the surrounding parishes.

With the scale of the Zoo's vision, the Zoo will need to build awareness on two tracks: (1) with the community and philanthropic leadership through one-on-one meetings and small gatherings, and (2) with the general public through marketing, PR and an increased media presence. The Zoo has great good news stories on a regular basis about its animals, educational impact and conservation work – these are what need to get more ongoing publicity.

It is important to be cautious about going out to the community with messages about the Zoo's vision until after significant work is done just to better introduce the community to the Zoo and create increased awareness about the Zoo, its animals, its mission and work in education and conservation.

The Zoo staff should be working to ensuring that clear messaging and talking points are developed and available for all levels of Zoo advocates including the FOZ Board, Steering Committee, Zoo staff, BREC Commissioners, BREC Foundation Board members and even loyal Zoo Friends. The community has a history of challenging and thwarting major projects that have been vague in their messaging and not fully transparent.

Next Steps in Planning - Suggested Timeline

With the momentum generated from the feasibility study and subsequent conversations, it is critical to maintain the excitement and energy about the Zoo's vision. To do so requires an accelerated and aggressive planning process. In the timeline below are the recommended next steps for the Zoo. While, it is an aggressive timeline, it is achievable and will serve to generate even more momentum. The Friends of the Zoo should continue to invest, lead and logistically manage the planning for the Zoo to ensure timely execution of the process.

Suggested Timeline	
Date	Activity
May 2015	Friends of the Zoo Meeting to present Feasibility Study Key Findings and Next Steps
May 2015	BREC Meeting to review Feasibility Study Key Findings and Next Steps
May – June 2015	Provide “Study Stakeholders” an overview of the Feasibility Study Key Findings and Next Steps
June 2015	Develop and launch Zoo visitor surveys and collect basic visitor information
June 2015	Recruit Steering Committee; ongoing process
July 2015	Outline key message points (FAQ) to share with key stakeholders and friends
July – Sept 2015	Engage a zoo planning firm to manage a design charrette and develop a concept facility plan
July – Dec 2015	Engage potential partners with the Zoo through introductory and cultivation meetings
Aug – Oct 2015	Develop a strategic business plan that frames the business goals to support the concept facility plan and defines a sustainable funding model for the new concept facility plan
Aug – Nov 2015	Assess site location options and opportunities
Sept – Oct 2015	Develop communications and cultivation plan to “rollout” the concept facility plan and strategic business plan findings, recommendations and next steps
Oct – Dec 2015	Begin fundraising campaign preparation and increasing internal capacity for awareness building and fundraising

Appendix A

Interview Invitation Letter



**FRIENDS OF THE
BATON ROUGE ZOO**
3601 Thomas Road
Baton Rouge, LA 70807
Phone: 225.778.4009
Fax: 225.775.3931

www.brzoo.org

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Scott Hensgens
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Cheryl Olinde
Mary Lou Potter
Nadine C. Russell
Joseph Simmons
Chris Stelly
Phil Frost – Ex Officio
Zoo Director

February 13, 2015

Name
Address
City, State Zip

Dear Potential Interviewee,

We're pleased to say that at the onset of the new year, the Baton Rouge Zoo has already been hard at work improving animal exhibits, expanding the reach of educational programs and increasing our role in international animal conservation. We have developed a compelling new vision to dramatically re-imagine the visitor experience through significant renovations to the Zoo and envision the Baton Rouge Zoo as an even stronger dynamic cultural and community asset for all to enjoy.

To help us frame our strategic roadmap and implement this new vision, we are engaging approximately 25 key community, business, philanthropic and political leaders in a conversation around the options and opportunities for a "new" Zoo. With the financial support of Friends of the Baton Rouge Zoo, we have retained the consulting firm of Schultz & Williams to conduct a feasibility study to test and validate the Zoo's potential to move forward with this dramatically re-imagined Zoo.

We are writing to invite you to take part in this extremely important process. Specifically, Schultz & Williams' Vice President, Rick Biddle, and Consultant, Jill Macauley, would like to meet with you to seek your advice, guidance and response to our plans. We anticipate needing no more than 45 minutes of your time.

Your comments will be kept confidential and will be used as background for the Schultz & Williams' recommendations on how we should proceed. We'd like to stress that this interview is not a solicitation; rather, it will be an opportunity for you to share with the Schultz & Williams team your honest thoughts and feedback regarding our vision and the future direction of the Baton Rouge Zoo.

Kaki Heilighenthal, Director of Marketing and Development for Friends of the Baton Rouge Zoo, will contact you shortly to arrange a mutually convenient time for your interview. Once an interview is scheduled, a packet of information will be sent to you in advance of the meeting to help prepare you for the discussion.

We thank you in advance for your time, interest and valuable perspective.

Sincerely,

Phil Frost
Zoo Director
BREC's Baton Rouge Zoo

Jim McIlwain
President
Friends of the Baton Rouge Zoo Board of Directors

Carolyn McKnight
Superintendent
BREC

List of Interviewees

BREC's Baton Rouge Zoo
Feasibility Study

List of Interviewees

Joel Baines, VMD, PhD
Dean
LSU School of Veterinary Medicine

Annette Barton
Community Volunteer

Scott Berg
Market President, Baton Rouge
Lee Michael's Fine Jewelry

Lori Bertman
President and CEO
Irene W. and C.B. Pennington Foundation

Daniel Bevan
President, CFO, Treasurer & Trustee
Huey and Angelina Wilson Foundation

Dennis Blunt
Partner
Phelps Dunbar, LLP

Tee Brown
President
GMFS

Steve Carter
State Representative, LA 66th District
Louisiana House of Representatives

William Daniel
Chief Administrative Officer
Office of the Mayor-President of East Baton
Rouge

John Davies
President and CEO
Baton Rouge Area Foundation

Franklin Foil
State Representative, LA 70th District
Louisiana House of Representatives

Perry Franklin
President and Principal in Charge
Franklin Associates

Garret Graves
State Representative, LA 6th District
Louisiana House of Representatives

Todd Graves
Founder, Chairman and CEO
Raising Cane's Chicken Fingers

Gwen Hamilton
Interim CEO
East Baton Rouge Redevelopment Authority

Marvin "Kip" Holden
Mayor-President
East Baton Rouge Parish

Dr. Kim Hunter-Reed
Senior Associate
HCM Strategists

Kathryn Kissam
Community Volunteer

Adam Knapp
President and CEO
Baton Rouge Chamber of Commerce

Charlie Lamar, III
President, Board of Directors
The Charles Lamar Family Foundation

Charles Landry
Partner
Fishman Haygood

Mickey Parenton

Senior Vice President of Operations
and General Manager
Pinnacle Entertainment L'Auberge Casino &
Hotel in Baton Rouge

Bob & Sue Rainer

Partner/Community Volunteer
Rainer Anding Talbot & Mulhearn/NA

Kimberly Robinson

Partner
Jones Walker Law Firm

Dr. Christel Slaughter

Partner
SSA Consultants

John F. Smith

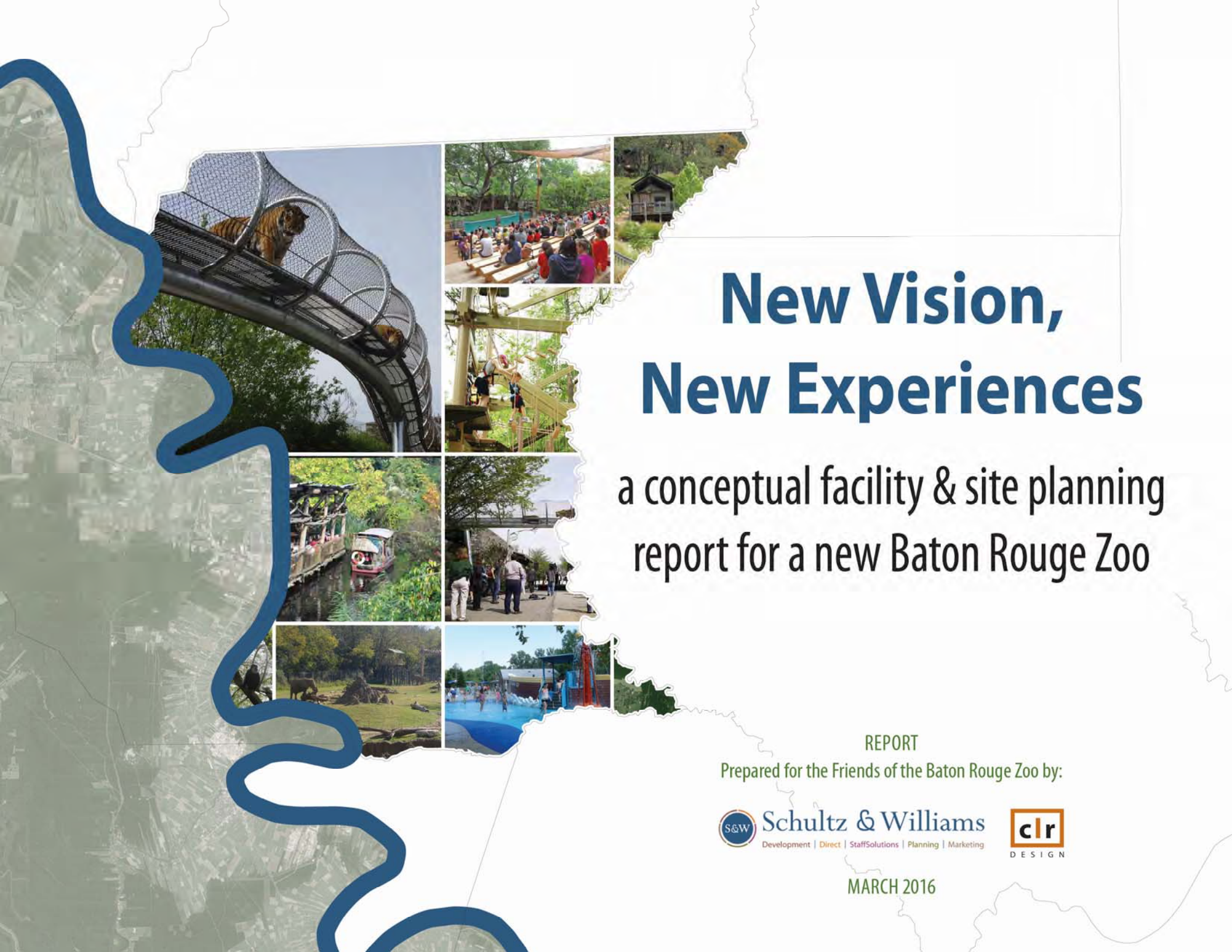
Consultant
The Godfrey Center for Creative Strategies

Roland Toups

Chairman & CEO
Turner Industries

Mike Wampold

Chairman and CEO
Wampold Companies



New Vision, New Experiences

a conceptual facility & site planning
report for a new Baton Rouge Zoo

REPORT

Prepared for the Friends of the Baton Rouge Zoo by:



Schultz & Williams
Development | Direct | StaffSolutions | Planning | Marketing



MARCH 2016

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Introduction

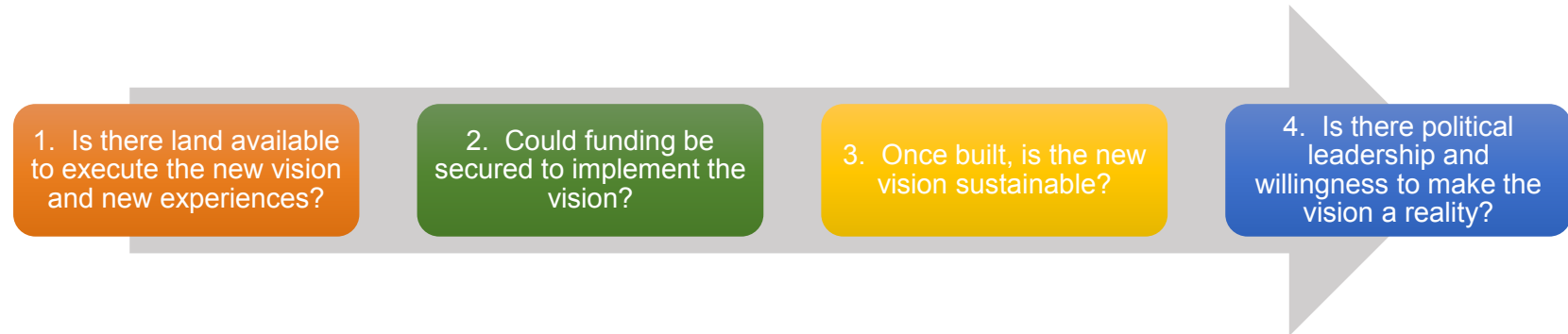
Conservation. Education. Community Engagement.

Long the hallmarks of any good zoo, a mission of conservation, education and community engagement is carefully woven into exciting visitor experiences that also serve as enjoyable recreational opportunities for families, school groups, residents and visitors. Zoos today are critical centers of community life in so many ways, offering visitors the opportunity to interact with wildlife and nature, enhance their wellness through active play, explore the local heritage, and celebrate special events. The most successful zoos are also seeking meaningful ways to collaborate with other local organizations and venues to positively impact and leverage the value of the cultural, educational and recreational offerings of a city/region for residents and visitors alike.

The mission is no different for the Baton Rouge Zoo (the Zoo). At the current time, however, the Zoo finds itself at a crossroads: make significant changes to provide for the ongoing wellbeing of the animals; make necessary infrastructure improvements; maintain the safety of the visitors and staff; update exhibits and amenities to meet today's standards and expectations; and provide unique and interactive experiences that will keep visitors engaged and wanting to return. The critical planning issue is whether the Zoo should make these significant investments at its existing site, or take the opportunity at hand to explore the option of transforming the Zoo experience at a new site that will offer advantages not available at the current site.

Strategic Planning Questions

To thoroughly consider this issue, we must address the following four strategic questions:



The purpose of this Conceptual Facility and Site Planning Report is to begin to answer those four questions.

To help us do so, we will first:



This process will help us address our questions, enabling us to then recommend next steps as the Baton Rouge community considers the potential impacts of a reimagined Zoo.

THE STATUS QUO
IS NOT AN OPTION.
CHANGE MUST
OCCUR FOR THE
ZOO TO BE
SUCCESSFUL AND
SUSTAINABLE.

A few givens to be kept in mind throughout this report on whether the reimagined Zoo is developed at the existing site or at a new site:

- The status quo is not an option. Change MUST occur for the Zoo to be successful and sustainable in the future.
- The newly imagined Zoo will remain a BREC facility. The vision and all planning is committed to making decisions that advance BREC's mission and are in its best interests.
- Cost to build is not a factor in the determining criteria because it is the same – \$110 million – no matter the site, existing or new.
- Should the decision be made to build the reimagined Zoo at a new location, Greenwood Park will remain a valued asset to BREC and the surrounding community, likely even growing in relevance and popularity as the community's input is sought and considered.
- Every effort must be made to engage the community and leverage strategic partnerships with existing community resources to get the most bang for the buck and to make the best possible impact – on economics, culture, education, conservation, recreation, and vibrancy of the city.
- Ongoing communication is key. Sharing the message and vision of the transformed Zoo effectively and passionately will be of utmost importance. Ensuring that the community, local and state politicians, and potential donors understand and embrace the vision is critical to successful fundraising and “friendraising”.
- There are additional phases of planning work to be completed after this report to continue evaluating the best options at any site location for the new Baton Rouge Zoo.

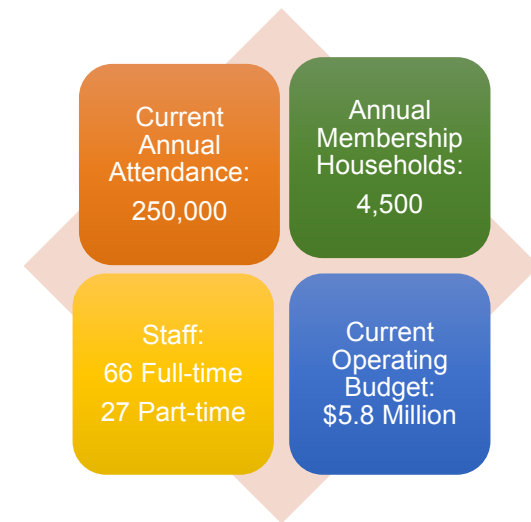
The Baton Rouge Zoo Today & Community Trends

About Today's Zoo

Opened in 1970 with the encouragement of local celebrity Buckskin Bill, the Baton Rouge Zoo has emerged as a valued community asset and a top cultural attraction in Baton Rouge. The first zoo in Louisiana to be accredited by the Association of Zoos and Aquariums (AZA), the Baton Rouge Zoo has always maintained the highest standards in animal care and zoo operations. With active education and outreach programs, the Zoo reaches thousands of school children each year with its message of conservation and appreciation for wildlife.

The Zoo is owned and operated by the Recreation and Park Commission for the Parish of East Baton Rouge (BREC), a public government agency, and is supported by the Friends of the Baton Rouge Zoo (FOZ), a 501(c)(3) organization. Working closely with BREC, the FOZ raise funds for capital projects, strive to increase attendance through special events and programming, and promote community involvement.

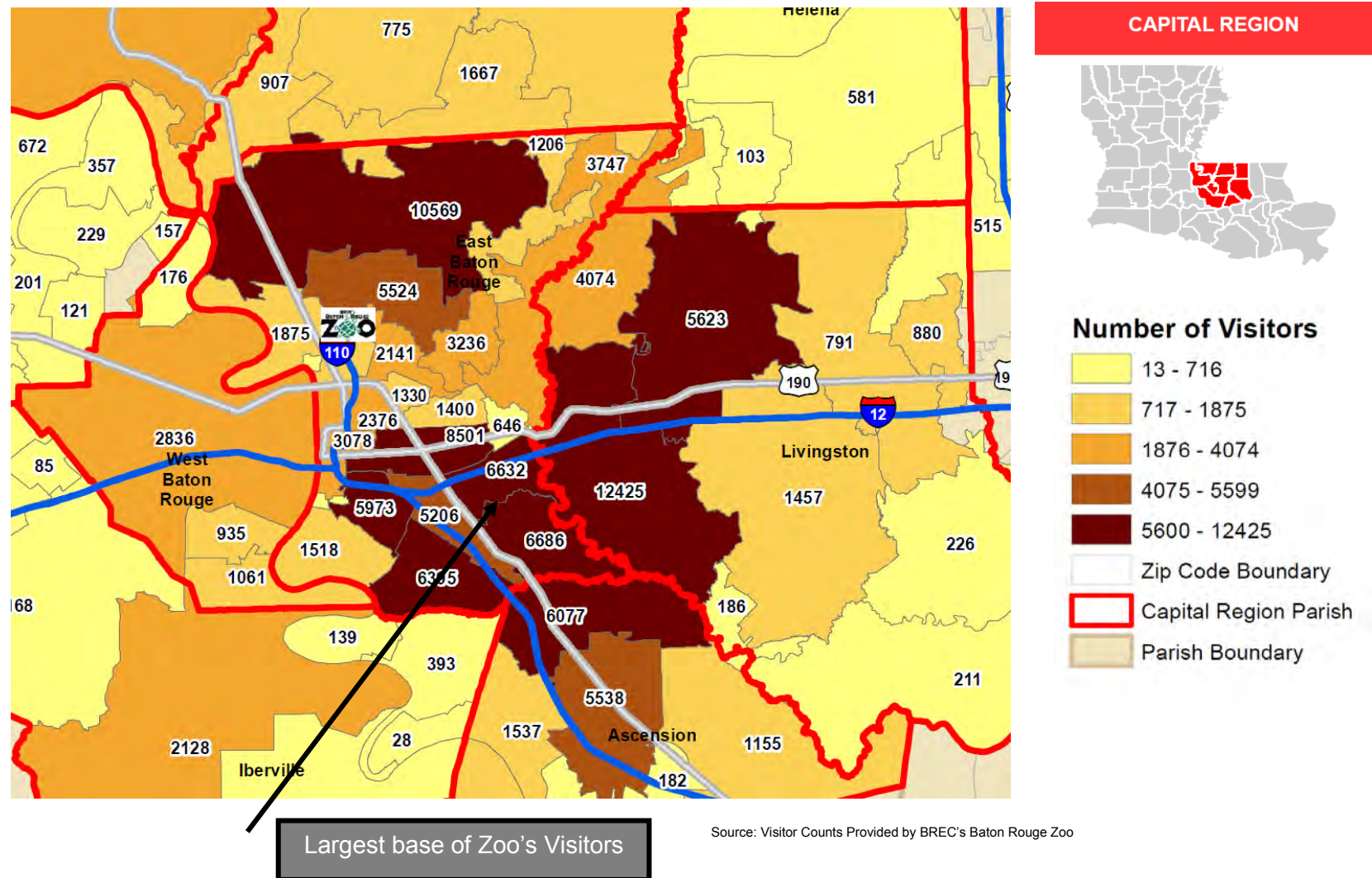
The Zoo operates under a dynamic public/private operating model with a balanced budget supported by earned revenues, contributed revenues from the Friends and community support through BREC tax initiatives. The Zoo's current \$5.8 million operating budget includes salaries and services provided by East Baton Rouge Parish through BREC. In comparison to similar zoos, the Zoo receives a lower level of funding for operating and capital needs.



The AZA did an economic impact study of the Zoo. Based on employing nearly 100 employees, generating 250,000 visitors annually, and spending \$5 million on goods and services, the Baton Rouge Zoo contributes approximately \$17.67 million annually to the local economy.

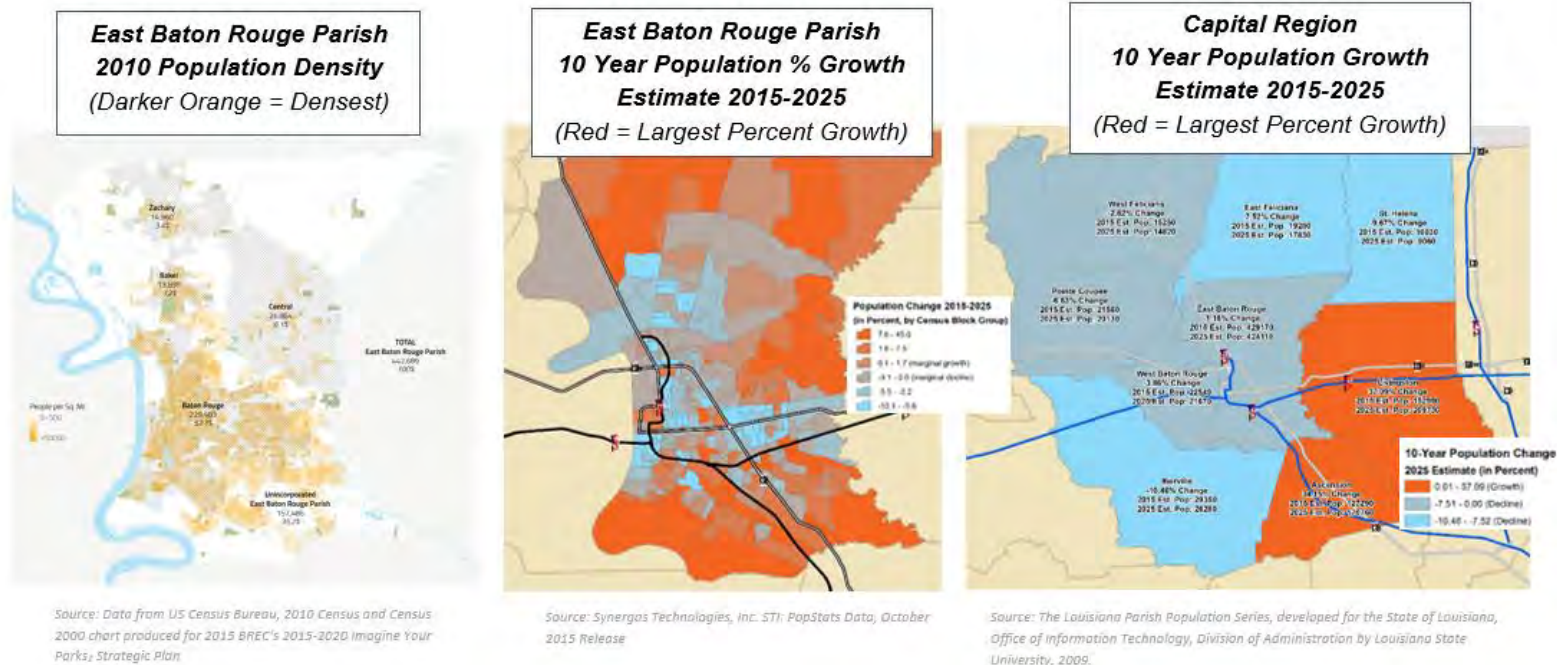
Current Zoo Visitor Demographics

Today, over 90 percent of the Zoo's 250,000 visitors come from within the state of Louisiana. The image below has the Zoo's 2015 attendance data plotted across the region, and it shows how the largest percentages of visitors are coming from south of the Zoo.



Metropolitan Area & East Baton Rouge Parish Trends

The Baton Rouge Metropolitan Statistical Area (MSA), containing 9 parishes, has been growing beyond projections over the past 15 years. The population of East Baton Rouge Parish has lagged, though, in comparison to growth in other parts of the MSA. Parishes with the highest levels of growth in the Baton Rouge MSA are Livingston and Ascension in the southeast. US Census Bureau projections indicate that East Baton Rouge Parish population growth will either remain flat or continue decreasing over the next decade. The trends in population shifts in the parish indicate that younger families prefer the southern areas of the parish (in and around the southern Baton Rouge city limits), though there is also some school-driven growth in other areas like Zachary and Central.



East Baton Rouge's population is densest towards the south, and population trends indicate that will continue.

Zoo & Location/Relocation Case Studies

It is extremely difficult to draw meaningful parallels between zoos in different cities that face significantly similar challenges due to location, local and regional economics and politics. Furthermore, it is not common for zoos to relocate.



Indianapolis Zoo (IN) Source: Unknown

Two zoos that have relocated – Indianapolis Zoo in Indianapolis, IN and Cameron Park Zoo in Waco, TX – have experienced significant growth since moving in 1988 and 1993 respectively. Attendance and memberships saw significant increases, which have fluctuated over the years but have always remained exponentially higher than prior to the move.

With the move, Indianapolis Zoo's attendance jumped from 280,754 in 1986 to 900,000 in 1988 at the new location. Today, the Indianapolis Zoo has over 1.2 million visitors annually.



Cameron Park Zoo (TX) Source: Unknown

The Cameron Park Zoo attendance increased by 25% when it moved in 1993 and has since averaged a 10% annual growth between 1994 and 2014. The Cameron Park Zoo today has around 250,000 visitors.

Additionally, as their budgets and animal collections grew so, too, did their staffing levels, providing additional jobs

and a greater economic impact on their communities.



Jackson Zoo (MS) Source: Unknown

One zoo that has repeatedly discussed relocating, but has instead stayed put is the Jackson Zoo in Jackson, MS due to lack of vision and political leadership. In its original location in an area not considered to be ideal, the Jackson Zoo has seen a general decline in attendance despite a metropolitan population that has almost doubled in the past 25 years. In the 1980s, the Jackson Zoo had around 330,000 visitors and today, it has about 113,000 visitors. The Baton Rouge Zoo could face similar circumstances if status quo is allowed to continue.

Community/Audience Sentiments



Collecting data and gaining the input of the community and Zoo visitors is a multi-step process that is crucial to the Zoo's ability to forge a strong plan for moving forward. BREC and the leadership of the Zoo are committed to responsively engaging with the residents of the surrounding neighborhoods. Therefore, BREC has made it an absolute priority to work with the surrounding neighborhood to develop BREC's Greenwood Park into an increasingly used and valued asset by those who live closest to it.

As a first step moving towards that goal, BREC commissioned a market research study by Percy & Company of 327 residents of neighborhoods within a two- to three-mile radius of Greenwood Community Park the weekend of November 7-8, 2015. Results indicated that Greenwood Park is popular among visitors for family outings for relaxation, exercise and play. Possible enhancements considered highly desirable included an adventure playground, a water park or swimming pool, and a fishing lake.



The Zoo also engaged ImPRint Communications, a communications firm, to begin conducting a guest satisfaction survey that gauged the experience of 102 Zoo visitors over a 6-day period in November 2015. From this initial survey, the overall response was that visitors were generally satisfied with their experience at the Zoo and would most likely visit more often if there were more animals, a better location, and/or more events. For the Zoo visitors, there was essentially no value added by the Zoo's location.

From our standpoint and the purposes of this Conceptual Facility and Site Planning Report, there are several major take-aways from these two reports:

For the people who live near Greenwood Park, the Zoo is not the reason they go to the Park. They go for other recreational activities. (Source: Percey & Company)

Greenwood Park has potential for alternative uses that are valued by the surrounding North Baton Rouge community. As 73% of this community does not visit the Zoo frequently, they said that significantly more people would go to the Park if it had an adventure playground and/or a water park/pool for families with children. Additional community input is being sought on these issues. (Source: Percey & Company)

The location of the Zoo is a tricky question. Most of the people there did not see the location as a big deterrent. However, the fact that they were at the Zoo when asked that question almost negates the validity of their response – if they perceived the location as a big deterrent, they would most likely not have been there at all. (Source: ImPrint Communications)

Even though most respondents did not see the location as a deterrent, over 87% of survey responders were also not spending extra time in the general area purchasing food, shopping, or partaking of additional family time together. (Source: ImPrint Communications)

For those who felt the location was a deterrent, a downtown or near-LSU location was considered more convenient. (Source: ImPrint Communications)

To generate more excitement, visitation and repeat visitation, anything the Zoo can do to dispel the perception of a static, non-interactive experience would be recommended. Most input related to what people would like to see at a nearby park suggested dynamic, active and interactive ideas, many of which would enrich a zoo experience as well. (Source: Percy & Company; ImPrint Communications)

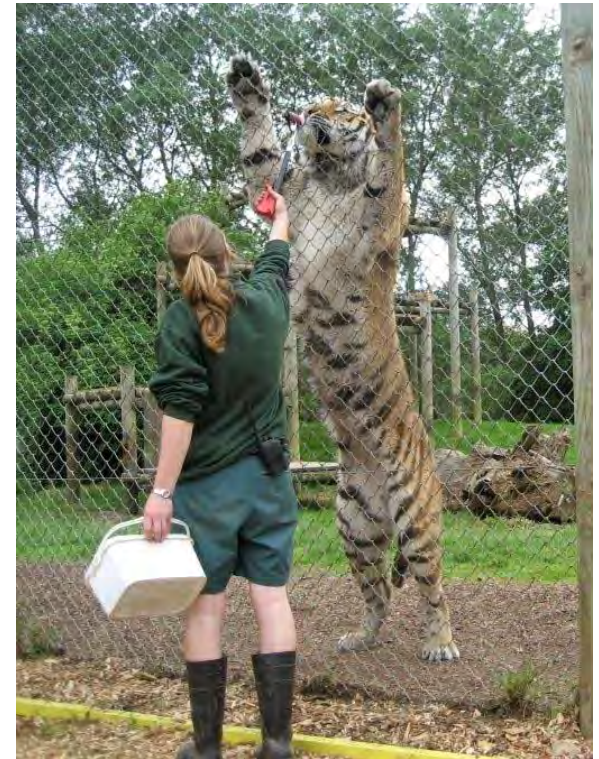
The New Vision, New Experiences

It's all about transformation. About big ideas and pushing the limits of what was thought possible. About putting together a strong team, a smart plan and the will to make things happen. About seeking and strengthening partnerships that will benefit the entire 9-parish community.

And the Zoo sits right now on the cusp of what could be a real game changer for East Baton Rouge Parish, its residents and visitors and, of course, the Zoo itself.

To test the Zoo's leadership dream to transform the Zoo, a feasibility study was conducted in spring 2015 by Schultz & Williams to gather input on the options and opportunities of a significant reinvention of and investment in the current visitor experience, including assessing the ideal site location.

This vision for a transformation of the Zoo was strongly supported by those interviewed for the feasibility study. Through the course of each scheduled conversation, most of the interviewees (over 80%) demonstrated a growing excitement about the ideas being shared and most interview encounters concluded on a very positive note with expressed support – both philosophically and eventually financially - for the Zoo's vision.



Since the conversations in May, the buzz about a newly imagined Zoo has intensified. There have been numerous articles and opinion pieces in the local newspapers, drawing passionate feelings from many local/regional residents.

This dynamic community dialogue continues on and has energized potential donors and others who want to see the Zoo's new vision realized. Through the process of reaching out to the community and building on the excitement being generated through the media, BREC engaged a group of civic-minded individuals to form a Steering Committee dedicated to realizing the Zoo's new vision.

The Steering Committee is tasked with the responsibility of:

- Keeping the conversation moving forward;
- Studying and discussing this report and the findings and recommended next steps contained herein;
- Engaging with the political leadership to help advance the next steps;
- Cultivating and soliciting donors to support the plans; and,
- Working closely with BREC to ensure that the Zoo's new vision is realized responsibly.

Included on the following pages is a portion of the vision statement that was shared with community members in one-on-one meetings as part of the feasibility study and that continues to serve as the storyline of the vision:



The New Vision, New Experiences, New Baton Rouge Zoo

A VISION FOR A NEW BATON ROUGE ZOO

Uniquely Baton Rouge—A Great, New Zoo for our Nine-Parish Area

The leadership of BREC's Baton Rouge Zoo has a vision to completely re-imagine the current Zoo through a transformation of the visitor experience into a zoological journey that offers our city, residents, families, visitors and guests a fun, unique zoo adventure.



The Zoo, Friends of the Baton Rouge Zoo Board of Directors, and BREC leadership are united and determined to give Baton Rouge the great zoo that it deserves, establishing it as a key cultural cornerstone of this growing and dynamic city. Our city should not settle for anything less.

Armed with the vision to provide Baton Rouge with a great zoo, one that is uniquely special for our city, much planning and consideration has gone into developing what hopes to be a complete transformation of the Zoo. Visitors will be engaged through interactive, highly-personalized wildlife experiences that are compelling and memorable.

Only a lucky few can afford to take a safari in the native lands of our animals, so we are bringing the experience to our community to discover, explore and connect with wildlife right here at Baton Rouge's new Zoo.

Baton Rouge's new Zoo will be the entertainment and educational destination for residents and tourists in the Baton Rouge region. Our region deserves a new and great zoo!

A Destination for All in and Around Baton Rouge

The new Baton Rouge Zoo will provide far more than an opportunity to view animals. The vision for the new Zoo, which is modeled after the leading zoo trends in the nation, is to offer fun, creative, immersive experiences that have the power to deliver a compelling message about preserving wildlife in wild places for a public that is increasingly isolated from nature.

This great, new Zoo will serve as a living classroom where visitors learn about real-life conservation and research programs – both at the Zoo and in the wild – through interactive engagement with keepers, docents and Zoo staff.

Conservation is an ever-changing need in our society. Educating our youth, families and elders will provide them with the tools and/or knowledge to help increase endangered species populations, decrease waste, conserve energy and make our world a better and safer place to live. The new Baton Rouge Zoo will continue to expand our role in community education and strive to serve as an educational hub from pre-school age to school age to those pursuing advanced degrees.

As a cornerstone of the new Zoo, the leadership plans to build a Conservation Learning Center, which will be the site for summer and holiday camps, overnight programs and school group activities. The Baton Rouge Zoo strongly believes in the philosophy of the African ecologist Baba Dioum:

“In the end we will conserve what we love, we will love only what we understand, and we will understand only what we are taught.”



Our New Zoo – A Whole New Adventure

The goal of the new Zoo experience is to take visitors through a multi-dimensional adventure to visit exhibits that are naturalistic and make visitors feel as if they have traveled into the wild. Learning from the trends among zoos today, the new Zoo's exhibit will connect the visitor to the animals through up-close perspectives and the opportunity to engage with the animals.

Imagine feeding a giraffe a lettuce snack, having a lemur jump next to you, or even having a bird land on your shoulder.



No longer will the Zoo visit be experienced just by foot – the wild and fun experience hopes to include:

- Ziplines and adventure courses;
- A train ride to take visitors behind the scenes;
- A bird's eye view of the animals riding a sky lift over the Zoo;
- Cooling off like elephants in wildlife-themed splash pads and water rides;
- A carousel featuring endangered species; and
- Other unique venues that give our visitors 360 degree views of wildlife.

Young children are curious and eager to learn about the natural world. Climbing, building, splashing, play-acting and daydreaming are fun and important for children's social, intellectual and physical well-being. When children play and explore in nature, they become more vigorous, cooperative and imaginative learners.

The adventure will continue at the new Baton Rouge Zoo as the visitor dines and shops. As visitors dine, their tables will overlook exhibits to create the feeling of sharing a meal with an animal while introducing them to the highest levels of eco-friendly restaurant practices. The shopping adventure continues the experience, with the opportunity to share the culture of different lands while building on the conservation message of the surrounding exhibits and overall mission of the Zoo. The visitor amenities have an extraordinary opportunity to help teach how conservation and culture interact and affect the world we share.

Supported by strong community partnerships, the new Baton Rouge Zoo will remain dedicated to being affordable, safe and accessible for all. As our Zoo is enhanced physically, careful consideration is made to design the Zoo to allow for easy navigation.

The Baton Rouge Zoo will no longer just be a place for day-time visits. The Zoo will offer businesses a progressive location for innovative corporate retreats. The new Zoo will be designed for fun-loving couples looking for a unique, memorable wedding venue. Additionally, zoos across the country are also creatively responding to the growing request to go beyond great group space by adding lodging that takes the experiences of the day into the overnight. Mission-driven designs of tents, lodges and more bolster the role of the Zoo as a tourist destination. As the vision for the new Baton Rouge Zoo is further developed through facility and business planning, lodging will be considered for the Zoo.

The collective leadership of the Baton Rouge Zoo feels it is critical that the new Zoo be created in close partnerships with our community. Strong support for the new Zoo to create synergistic relationships through partnerships with fellow cultural attractions, universities, corporations and government allows the Zoo to help generate a greater educational, conservation and economic impact for our region. The real value of the new Zoo will be in future synergistic relationships that will make it a true civic asset.



Baton Rouge deserves a great zoo that serves as a key cultural cornerstone of our growing and dynamic community.

Baton Rouge should not settle for anything less.

Conceptual Facility Planning Process & Potential Site Identification

Facility Planning Process

To begin addressing the critical questions outlined in the Introduction and build on the information gained through consultations, workshops and the feasibility study conducted beginning in November 2014, the Friends of the Baton Rouge Zoo (FOZ) retained Schultz & Williams (S&W) to prepare this Conceptual Facility and Site Planning Report in collaboration with CLR Design.

Utilizing information gained in this Conceptual Facility and Site Planning Study conducted throughout the fall of 2015, we have carefully developed findings and recommendations in support of a significant reinvention of and investment in an unparalleled zoo experience for the residents of and visitors to Baton Rouge.

Throughout the summer and fall of 2015, S&W and CLR Design visited Baton Rouge multiple times, carefully examining and assessing the current site, as well as other potential sites.

Transitioning Vision into Conceptual Facility Plan

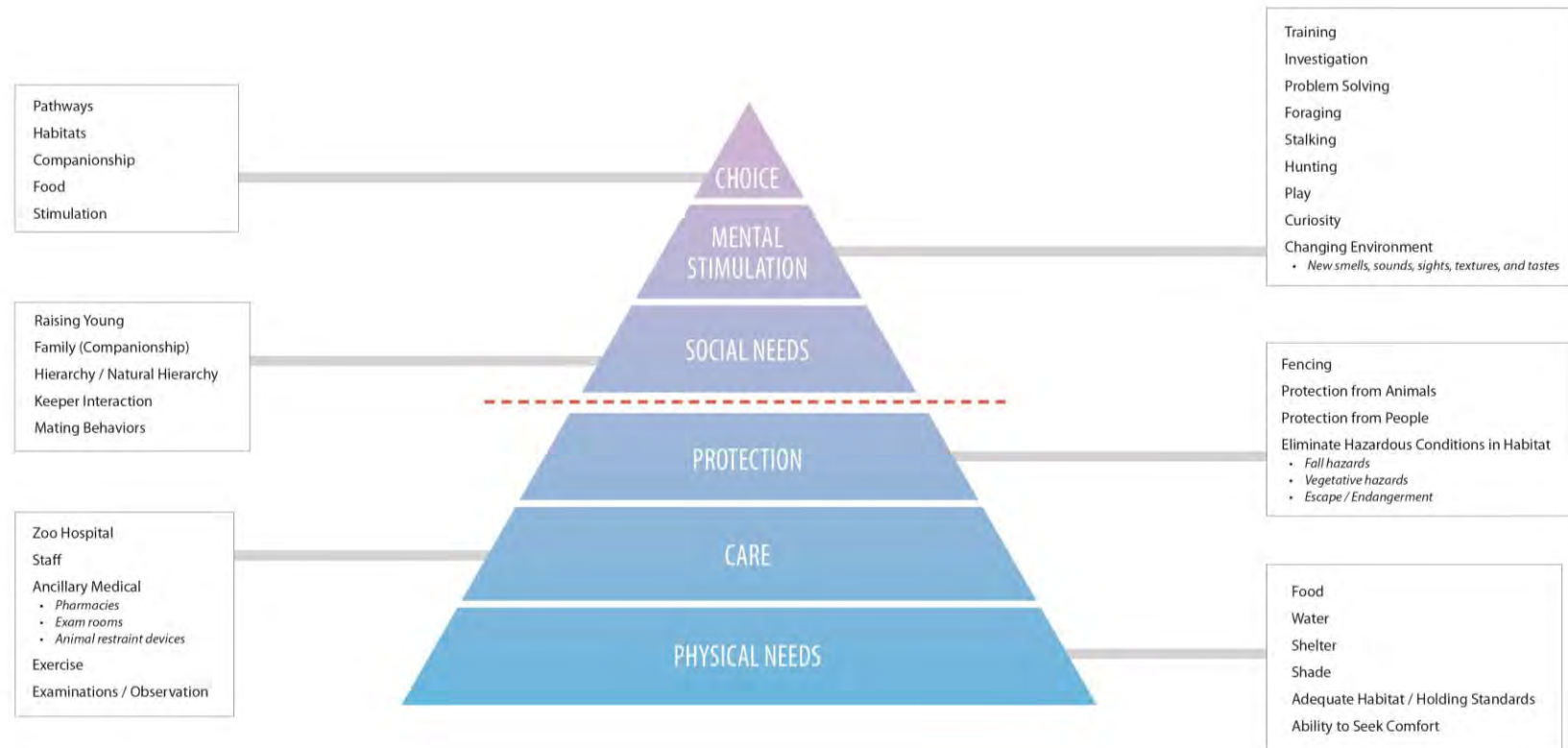
In developing this Conceptual Facility Plan, CLR Design and S&W kept at top of mind the mission and vision of the Zoo. We took a 360-degree view, thinking and planning from all perspectives: animals; visitors; staff; residents and taxpayers of Baton Rouge; philanthropic entities and potential donors; potential strategic partners; existing cultural/community organizations; and tourists and conventioners.

The planning approach for zoos is unique as there are really three clients that are being designed for – the animals, the zoo staff, and the visitors – rather than just one. Each client group influences the design with their specific needs and wants. This provides the opportunity to design a zoo with creative strategies for building the best environment and experience for each.



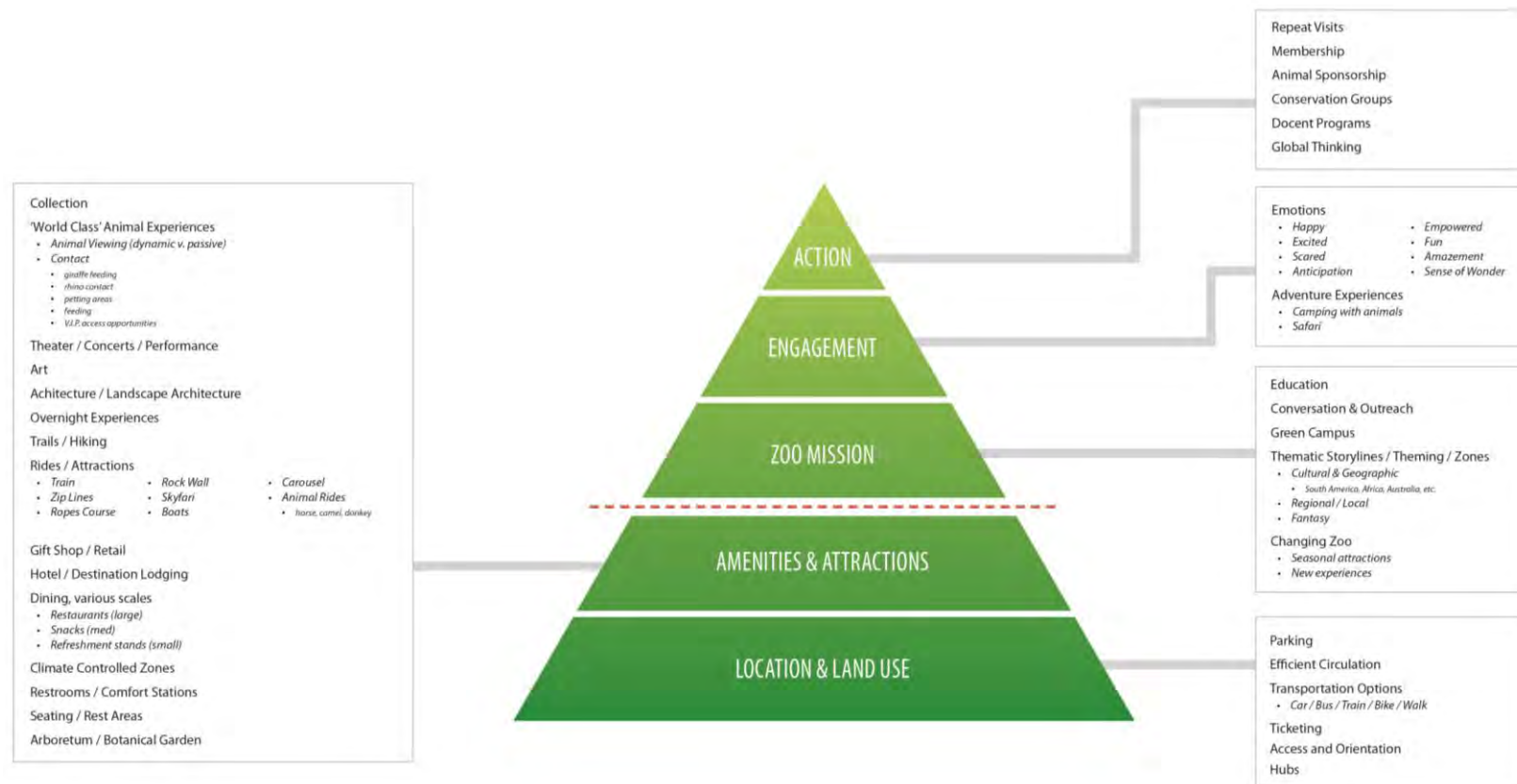
Providing animals the highest quality environments is top priority. When addressing the needs of the animals, the following diagram outlines the hierarchy of animal needs taken into account in zoo planning. The aim is to be innovative, resulting in both a safe and natural-looking habitat that provides an optimum lifestyle for the animals, while making visitors feel as if they are immersed in the space, rather than standing outside as an observer.

Animal Hierarchy of Needs



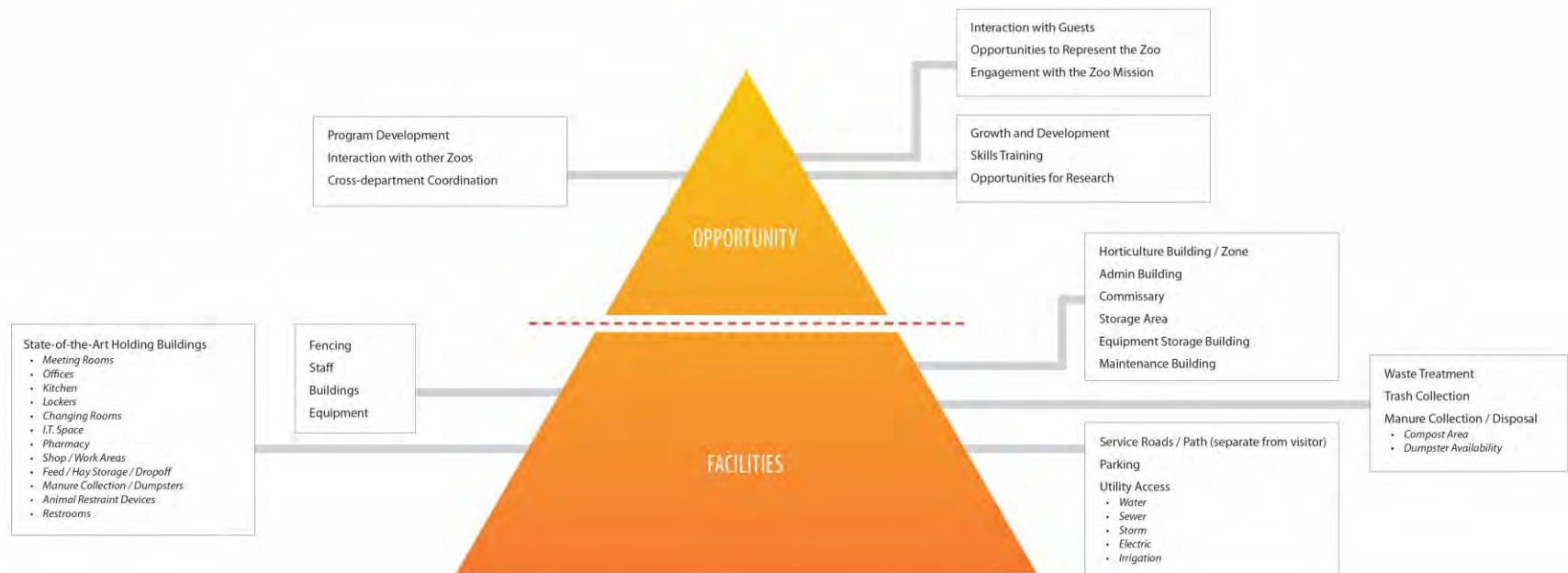
In planning, the most successful zoos have demonstrated how to create experiences that maximize the positive impact and connection of the visitors with the animals and conservation mission. The following chart outlines the planning approach to addressing hierarchy of visitor needs for that maximum impact and connection. Research continues to show that safe and fun environments set the stage for learning followed by action and then engagement.

Visitor Hierarchy of Needs



Throughout all zoo planning, we recognize that it is the staff that ensure the needs are met of both the animals and the visitors. And in order to do their job, the physical design of the zoo must incorporate their needs and create opportunities for them to excel. The chart below outlines the hierarchy of needs for zoo staff in planning.

Staff Hierarchy of Needs



The outcome of taking all the needs of our three clients into account is a safe, stimulating environment that satisfies the staff's requirements and animals' needs while providing the ultimate educational and fun experience for visitors.

As dreams grow and details emerge, so, too, does the need to evaluate and assess costs associated with realizing those dreams and what the expected return on investment (ROI) will be.

Careful consideration was given as we calculated the costs of transforming the existing site in comparison to creating a transformed Zoo at a new site. We developed projections on attendance, revenue generators, build-out costs, etc. and based our conclusions on our extensive experience working with zoos across the nation and on our detailed analysis of the proposed sites in relation to Baton Rouge's specific opportunities and challenges.



Our planning started by unpacking the vision and defining its key components as outlined below:

Animal Exhibits, Experiences & Support – A Wild, New Animal Exploration Experience

The zoological adventures at the new Zoo will offer a complete transformation for our visitors as they experience these key exhibits and experiences:

Life in the African Savanna – Elephants, Giraffes, Zebra, Rhino & Birds

A dramatic mixed-species exhibit built with rolling grasslands much like they would exist in the wild.

Elephant Oasis

Through the passion of our community, elephants have made their home in Baton Rouge for decades. Elephants are a flagship species for our Zoo; therefore, we are building them a brand new home. Specially designed for our elephants, this oasis will offer a stimulating, updated environment for the elephants by enhancing and expanding their habitat and enrichment. The Elephant Oasis provides

wonderful viewing areas for visitors, where they can see the animals at rest and at play and participate in educational lectures and demonstrations.

Giraffe Encounters

With an African-themed feeding platform that reaches out into the African Savanna, visitors will not only be eye-to-eye with these mighty giants, but they will also be able to touch, feel and feed the giraffes.



An Asian Escape – Tigers, Primates, Antelope & Birds

As visitors travel throughout their new Zoo journey, they will be immersed in the sights and sounds of Asia and see a range of animals from small primates to different wild cats to many types of hooved animals. This exhibit will build on the culture and experiences in the currently accessible Realm of the Tiger.

The South American Cloud Forest Adventure – Jaguars, Bears, Primates, Birds & Other Small Mammals

Visitors to Baton Rouge's new Zoo can embark on an enchanting journey through the forests of Central and South America in this exhibit, which will be filled with fascinating creatures. The scenery will be set with dozens of unique, beautiful and interesting plants, trees and shrubs. Cloud forests are higher ground areas covered in moisture and mist. These "islands in the sky" are filled with several species that are not found anywhere else in the world. Visitors will have to keep their eyes and ears peeled for all the wild animals in the Cloud Forest.



Walk-Through, Free-Flight Aviary Experience

Visitors will be invited into a large walk-through exhibit which creates an experience unlike any other – an intimate, up-close interaction between visitors and free-flying birds, including opportunities to hand-feed and meet many species from around the world.

Wild Louisiana: Atchafalaya Basin – Cougars, Bobcats, Bears, Birds of Prey & Aquarium

The Atchafalaya Basin is the nation's largest river swamp, stretching across 14 parishes in south-central Louisiana. It is home to thousands of species of bird, fish, and animals. At the new Zoo, visitors can learn about this critical ecosystem and animals including the many endangered species in Baton Rouge's backyard.



Many more wildlife experiences are envisioned for the new Zoo, which will showcase animals from around the world.

As the facility master plan is developed for the new Zoo, every exhibit will be designed and built with our animals and guests in mind. Additionally, all exhibits will be built to meet, if not exceed, the Association of Zoos and Aquariums' (AZA) guidelines. These are standards the Baton Rouge Zoo has practiced and adhered to since 1977 when it became the first Zoo in Louisiana to gain accreditation and the 19th Zoo in the nation to achieve this distinction.

Visitor Experiences & Amenities

People will not come to the Zoo more than once, if at all, if it is not relatively easy to get there.

Having multiple transportation options (car, bus, train, bike, hike, and walk) is extremely important for the success of the newly imagined Zoo. As most visitors will arrive by car, safe, affordable and easily accessible parking is also critical. Also important is the efficiency and safety of drop off points for school buses, vans, wheelchair accessible vehicles, etc.

Upon arrival, a welcoming, efficient, dynamic entry and ticketing point will draw visitors in, generating excitement for the visit ahead.

Visitors will be made to feel comfortable and cared for through climate-controlled zones; many, clean, and easily accessible restrooms; and comfortable and plentiful seating areas and resting places.

Visitors will enjoy a world-class animal collection with dynamic viewing opportunities and many chances to interact with the animals and staff.



Contact points between visitors and animals and staff may include:

- Animal training demonstrations with guest participation
- Giraffe feeding
- Hands-on learning
- Animal feeding experiences
- Other VIP access opportunities

There will be numerous chances and areas for visitors to get active at the Zoo and experience it through new and exciting perspectives that could include:



Creation of an amphitheater may provide a venue for a variety of special events and offerings including: live theater, concerts, performances, outdoor movie screenings and more. Public art may be incorporated into the design of the Zoo space and will be enjoyed by visitors along with the architecture and landscape design of the newly imagined Zoo. Other possibilities include an arboretum and natural areas for visitors to explore, enjoy, and edify themselves.

A themed destination lodging on Zoo grounds would provide an exciting and immersive experience for visitors and tourists, giving them an unforgettable experience unique to the Zoo.



A gift shop and other retail venues would enable visitors to take a tangible memory of their experience home with them. Various dining options would be available from a full-service restaurant, to convenience food snack areas, to refreshment stands – something to meet everyone's dietary needs. Special event catering (for weddings, corporate events, birthday parties and other celebratory gatherings) could be made available through the restaurant sites or through permanent and/or temporarily tented sites.



We would expect visitors to approach the Zoo with the thrill of anticipation and to experience the Zoo with a sense of wonder and amazement at the beauty and power of wildlife and our natural world.

Visitors' emotions throughout their visit might range from happy to excited to scared (these are wild animals after all!). They will marvel at the animals they encounter, have fun on the carousel, and feel empowered at mastering the rock wall. Without even realizing it, they will learn something about their regional/local culture, about geography, and about animal life through our themed exhibit story lines and our exceptional staff and educational programming. They will want to return, not only to revisit

their favorites, but also to see what's new with changing seasonal attractions and special events. They will want to become members – to achieve cost savings while also becoming a part of this truly wonderful organization. They will learn to care about our world's animals – especially those many species in danger of extinction. They will be moved to donate towards worldwide conservation efforts or adopt an animal. Some will even want to get more involved and volunteer at the Zoo or train to be a docent.

Staff

This transformation of the Zoo also offers an unparalleled opportunity to engage and energize the staff. With the proposition of new exhibits, educational components and programming, staff members can take an active role in defining how they will advance the Zoo's mission. The Zoo's staff has tremendous influence over every aspect of zoo operations— animal care and health, the efficiency and pleasantness of visitor encounters/transactions, physical appearance of the Zoo, quality of educational offerings and programs, etc.

Zoo staff were engaged throughout this planning process and should be encouraged to provide their continuing input on the unfolding plans and decision points. Specific attention should be paid to exploring opportunities for interaction/partnering with other zoos, cross-department coordination of zoo programs and special events, and internal and external opportunities to represent the Zoo. Every consideration should be given to promoting staff growth and development, advancing skills and training through additional education/courses/accreditation opportunities, and providing opportunities and incentives for staff-driven research projects.

In terms of facility needs for staff, consideration was made for necessary space such as parking, lockers, changing rooms, restrooms, and a commissary in addition to administrative space, professional offices and meeting rooms, I.T. space/requirements, etc.

Infrastructure

Though the least exciting to think about, the infrastructure is arguably the most important aspect of creating a successful, efficient, people-/animal-friendly, and sustainable zoo.

A strong and well-planned infrastructure lays the groundwork (literally) for smooth operations for decades and decades to come. Included in this are:

- Access roads/service roads and/or paths separate from visitor paths
- Parking lots
- Utility access (water, sewer, storm, electric, irrigation)
- Water treatment
- Trash collection - dumpsters
- Manure collection/disposal – compost area
- Feed/hay storage/delivery
- Fencing
- Equipment storage/maintenance sheds/buildings

Our plans promote easy access to the Zoo, no matter the site; efficient circulation in and around the Zoo; ease of entry and ticketing to create a welcoming approach and a positive first impression; and access and orientation hubs to provide visitors convenient meeting places and good access to food, restrooms, maps, information, directions, and seating areas.

The newly imagined Zoo will boast state-of-the-art facilities, taking into account the latest and best information about highest quality animal care and holding.

Availability and Feasibility of Sites

Is there land available to execute the new vision and new experiences?

Empowered with the positive results of the Spring 2015 feasibility study, the leadership of the Zoo, with the help of S&W and CLR Design, began collecting an inventory of available land sites that were over 75 acres. The project's Steering Committee was very helpful in providing information about possible sites. Throughout Fall 2015, several dozen conversations took place with land owners and representatives about the willingness to allow their land to be considered as a potential site for the new Zoo.

It is important to note that the Zoo will continue to evaluate both the currently identified sites as well as any new site options that may emerge from future conversations.

The main two criteria used to determine if a site should be evaluated further were: acreage over 75 acres and cost of the land.

Land would only be considered if were to be offered as a donation, as a land swap or as a long-term management lease. If the sites met those two criteria, additional land form and land use criteria were assessed including: current land use, adjacent land use, expansion potential, landform/terrain, existing vegetation, floodplain, aesthetic qualities, road access, public transportation access, zoning and any other restrictions.

As of February 2016, based on careful analysis of all of the land form and land use criteria information, the leadership of the Zoo identified three possible areas that are available:

- Greenwood Park/Existing Site
- Nicholson Corridor Zone
- Airline Highway Park

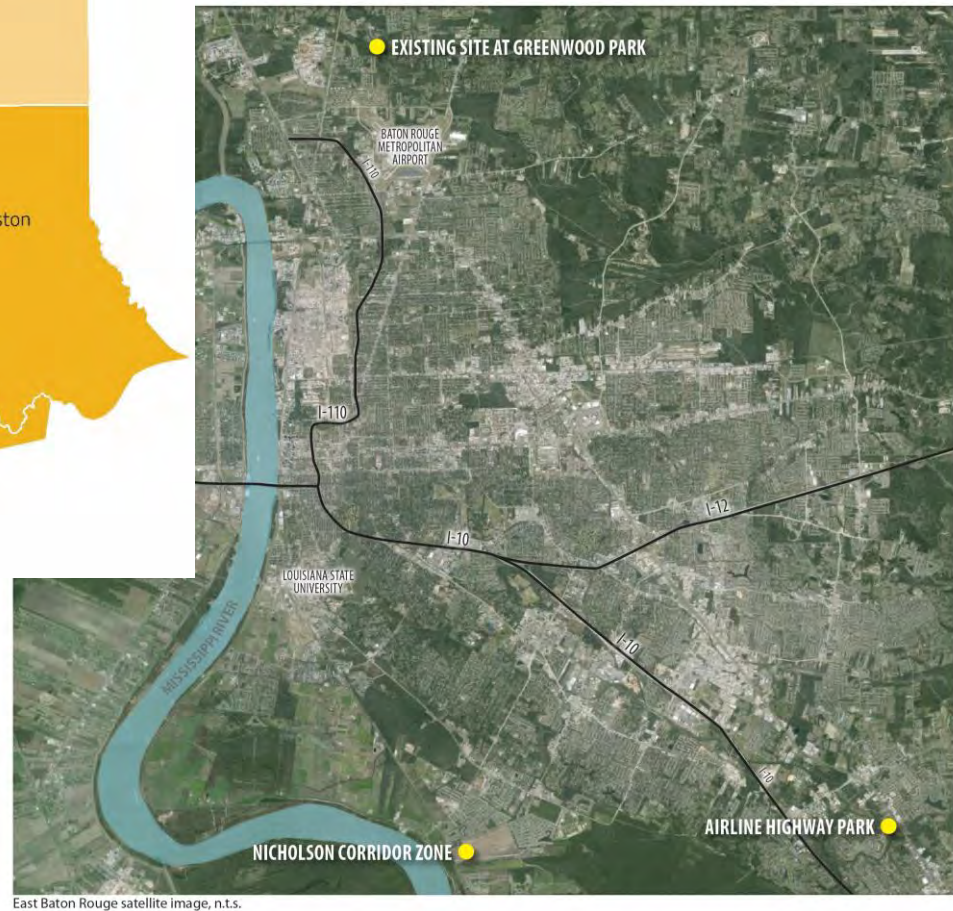
Additional discussions and phases of planning work needs to be done before the ideal site location is determined.

Map of Available & Feasible Sites

Percent Change in Population, 2000–2010



Source: US Census Bureau, 2010 Census and Census 2000



Knowing there are at least three viable site locations available with the possibility of others being brought forward and with the answer to the first strategic question answered – *Is there land available to execute the new vision and new experiences* – the planning focus shifted to testing the ability to conceptually design the vision on each of the three sites. We worked together to evaluate each site's physical layout, transportation accessibility and zoning.

The following chart compares each known site's assets and quality. As physical sites, each of the three sites has a good physical layout and no major negative site issues. If additional sites are identified, each will be compared with similar site criteria.

	EXISTING SITE AT GREENWOOD PARK	NICHOLSON CORRIDOR ZONE	AIRLINE HIGHWAY PARK
SITE CRITERIA			
Available Land (AC)	147 AC GOOD	100 AC GOOD	133 AC GOOD
Cost of Land	B.R.E.C. Property GOOD	Donated / Land Agreement GOOD	B.R.E.C. Property GOOD
Current Land Use	Zoo NEUTRAL	Agriculture GOOD	Recreational GOOD
Adjacent Land Use	Recreational GOOD	Residential GOOD	Residential / Light Commerce GOOD
Expansion Potential	Easy GOOD	Restricted NEUTRAL	Restricted NEUTRAL
Landform / Terrain	Flat GOOD	Flat / Open GOOD	Flat to Gently Rolling GOOD
Existing Vegetation	Mature Trees GOOD	Open NEUTRAL	30% cover by mature trees GOOD
Floodplain	100-Year Flood (AE) NEUTRAL	No GOOD	100-Year Flood (AE) NEUTRAL
Aesthetic Qualities	Attractive Site GOOD	Plain NEUTRAL	Attractive Site GOOD
TRANSPORTATION AND ZONING			
Road Access to Site	Interstate 110 to 19 to 423 NEUTRAL	Interstate 10 to Bluebonnet or 30 GOOD	Interstate 10 or 63 GREAT
Public Transportation	No NEUTRAL	No NEUTRAL	No NEUTRAL
Zoning Designation	A1 Residential NEUTRAL	PUD Planned Unit Development NEUTRAL	Rural NEUTRAL
Other Restrictions	---	---	15% Landfill NEUTRAL TO CHALLENGED

Next in the conceptual planning process, CLR design identified the optimal area for implementing the new vision at each of the identified site locations, tested the vision with rough sketches and then drew a full conceptual plan of how the vision could be implemented for an investment of \$110 million.

The following section lays out three illustrative maps and plans for each of the three available site locations. These comprehensive design and analysis documents are developed to identify and balance critical programmatic and operational needs within the framework of previously developed and undeveloped sites.

Existing Conditions Analysis

Site criteria for land development is studied including topography, geology, hydrology, and vegetation. Location use and accessibility are evaluated; major roads, adjacent land use, and property boundaries are assessed and documented.

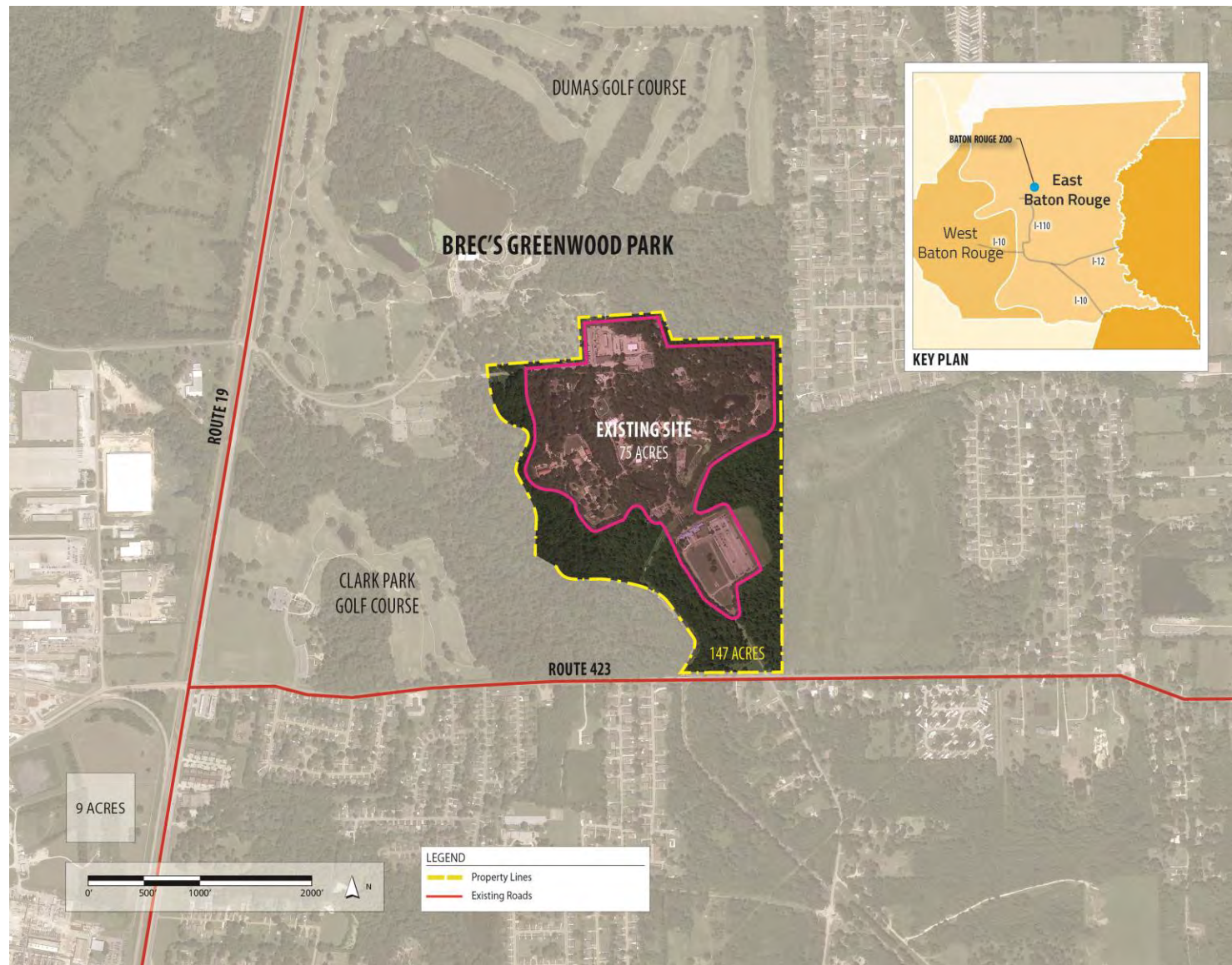
Conceptual Site Diagram

Program priorities are identified and tested in a corresponding layout of diagrammatic zones with major circulation patterns distinguished throughout these zones. A basic understanding of the feasibility to achieve program needs while balancing existing site advantages and constraints is examined.

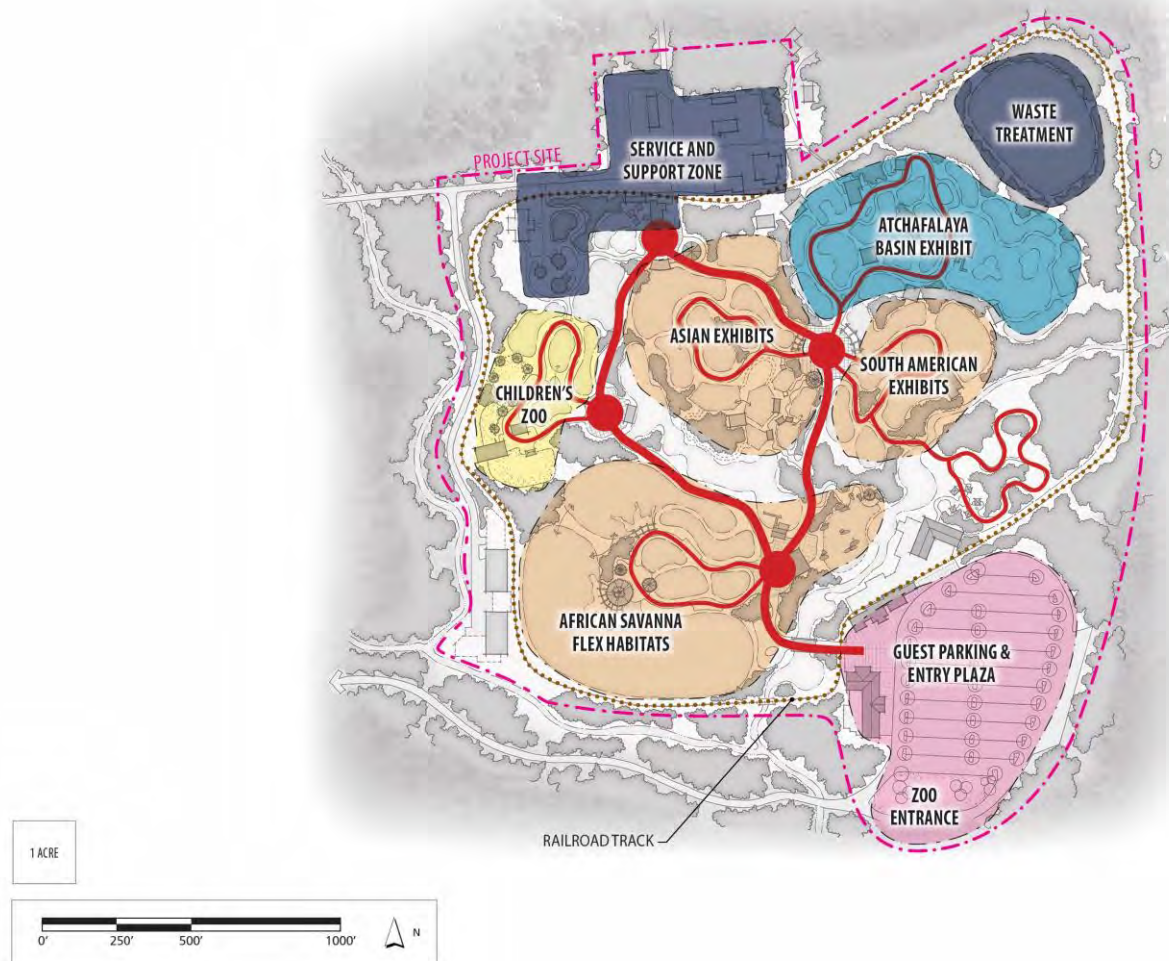
Illustrative Site Plan

Based on the priorities identified by the planning participants in the conceptual site diagrams, several concepts are applied for consideration within illustrative site plans. Integration with strategic objectives then help to shape the overall direction of the plan. These concepts include a more detailed design including exhibits and attractions, infrastructure systems, and operational facilities.

Conceptual Plan: Existing Site at Greenwood Park – Existing Conditions



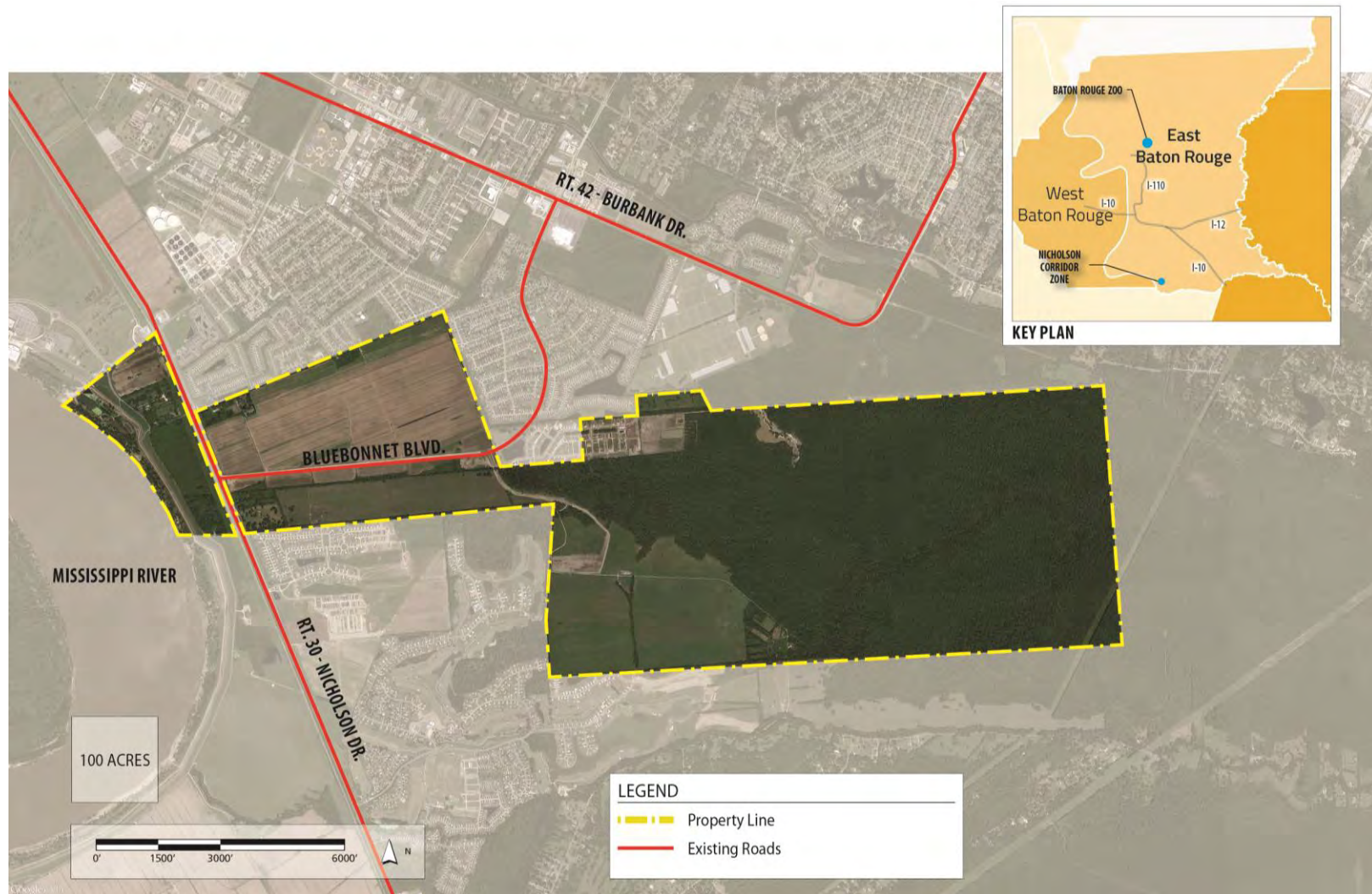
Conceptual Plan: Existing Site at Greenwood Park -- Conceptual Site Diagram



Conceptual Plan: *Existing Site at Greenwood Park – Illustrative Site Plan*



Conceptual Plan: Nicholson Corridor Zone – Existing Conditions



Within this zone, there are actually several large parcels of land. Further conversations with land owners and study of site planning needs to be completed prior to determining the final site location.

Conceptual Plan: Nicholson Corridor Zone – Conceptual Site Diagram



Drawn here is a conceptual site diagram on one of the possible 100-acre parcels of land within the Nicholson Zone, which meets the Zoo's site criteria. Further conversations with land owners and study of site planning needs to be completed prior to determining the final site location.

Conceptual Plan: *Nicholson Corridor Zone – Illustrative Site Plan*



Drawn here is an illustrative site plan on one of the possible 100-acre parcels of land within the Nicholson Zone, which meets the Zoo's site criteria. Further conversations with land owners and study of site planning needs to be completed prior to determining the final site location.

Conceptual Plan: Airline Highway Park – Existing Conditions



Conceptual Plan: *Airline Highway Park – Conceptual Site Diagram*



Conceptual Plan: Airline Highway Park – Illustrative Site Plan

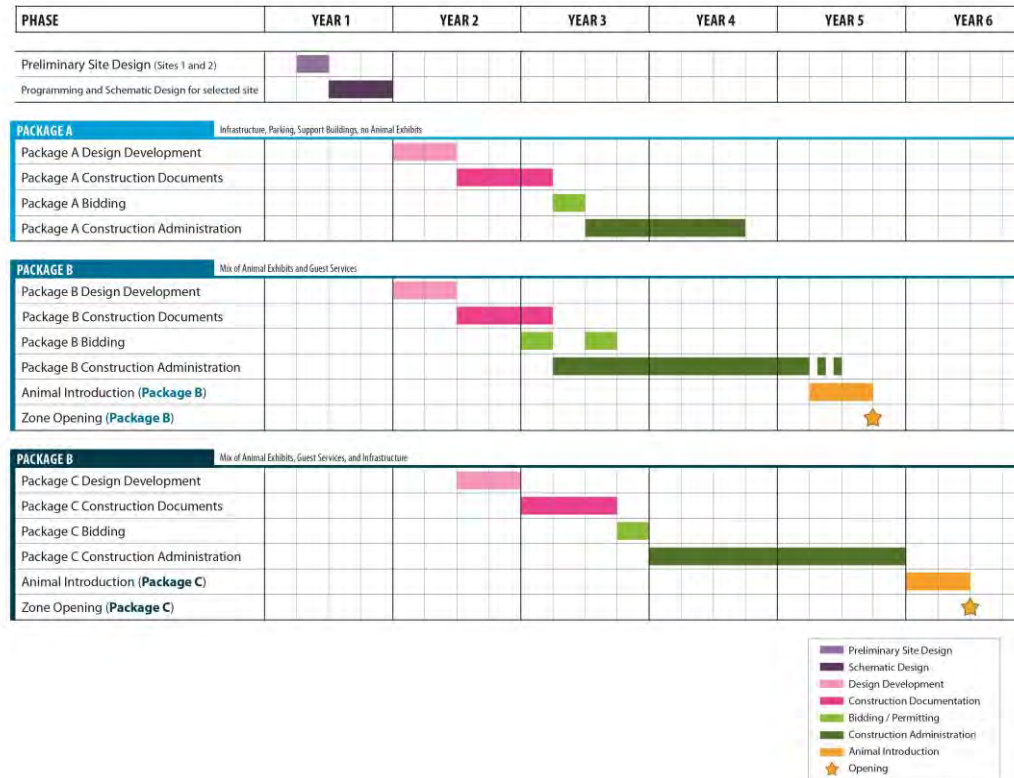


Detailed Design & Implementation

When a site is ultimately selected, there will be additional site planning work required to take the selected site from conceptual design to construction. This additional planning work will require about a five- to six-month effort to begin to program and plan the new Zoo on all levels – this phase is called detail design. This includes infrastructure projects, animal exhibits/guest attractions, and strategic services projects. As the rough scope is developed, the team will be tracking an order of magnitude overall budget, and various project timelines can be developed.

The duration of the implementation and construction phase can last three to five years and is broken into several sub-design phases and staggered construction efforts. Towards the end of this phase the goal is to be able to officially open the Zoo to visitors and begin operations while holding back some of the designed exhibits to be rolled out in the following two to three years in an effort to keep the momentum, the excitement, and the growth of the Zoo vibrant and appealing.

Implementation & Construction Buildout Timeline



The implementation timeline above is very likely for two of the three sites. For the existing site, however, the timeline will lengthen as the Zoo will need more time to secure the significantly higher percentage of public dollars required for this scenario. Therefore, it is likely that it will take 15 years or more to complete the full buildout at the existing site and most likely at a higher overall cost or less overall improvement current facilities if the budget remains fixed. At the existing site, it is possible to aim for 40-60% buildout with the timeline above, yet this is still very aggressive and optimistic.

Criteria for Success & Desired Strategic Impacts

Now more than ever, nonprofit organizations must consciously be thinking of sustainability and impact as they plan for the future. The most successful organizations are those that are forward-thinking and embracing of mutually beneficial collaborations. They seek to develop and leverage strategic partnerships that advance their mission, promote their financial stability, and make a significant impact on their communities. Working with the Zoo to define and pursue a transformative vision, we quickly realized that a thorough and considered approach called for the identification and assessment of the ideal site characteristics that would best position the Zoo for a successful and sustainable future.

Key Factor: *In most cases the cost to build would be one of the primary considerations in a study like this. However, in this case, the cost to build is not different whether the transformation occurs at the existing site or at a new site due to the significant infrastructure and deferred maintenance issues at the existing site compared to the suitability of the other two sites under assessment.*

In addition, since we have assumed that the capital investment will be \$110 million at any of the available sites, we recognize that the cost to build at the existing site will take longer than five years. With the additional construction time, inflationary dollars must be accounted for in the \$110 million investment. Therefore, at the existing Greenwood site, the full vision is not likely to be completely achieved as scaled-down experiences and/or attractions will be built to account for the inflationary costs.

Projected Cost Breakdown for Implementation of the New Vision

	EXISTING SITE AT GREENWOOD PARK	NICHOLSON CORRIDOR ZONE	AIRLINE HIGHWAY PARK
INFRASTRUCTURE	21.6%	24.8%	24.4%
450 Guest Parking Spaces, Entry Buildings, and Plaza	\$5,500,000	\$5,500,000	\$5,500,000
Water Treatment Plant Relocated	\$1,000,000	\$0	\$0
Underground Utilities, Water, Sewer, Storm, Electric	\$8,000,000	\$10,000,000	\$10,000,000
250,000 SF of Paved Guest Paths and Service Roads	\$2,500,000	\$2,500,000	\$2,500,000
Overall Landscaping - Trees and Shrubs	\$250,000	\$1,000,000	\$500,000
Major Earthwork - Site Regrading	\$300,000	\$800,000	\$800,000
Support and Maintenance Buildings	\$750,000	\$3,000,000	\$3,000,000
Animal Hospital	\$1,000,000	\$2,500,000	\$2,500,000
Zoo Administration Building	\$2,000,000	\$2,000,000	\$2,000,000
Demolition of Existing Buildings/Exhibits	\$2,500,000	\$0	\$100,000
TOTAL	\$23,800,000	\$27,300,000	\$26,900,000
ANIMAL EXHIBITS / GUEST ATTRACTIONS	61.8%	48.2%	48.2%
Africa Exhibits Phase I	\$19,000,000	\$19,000,000	\$19,000,000
Africa Exhibits Phase II	\$9,000,000	\$9,000,000	\$9,000,000
Asia Exhibits	\$12,000,000	\$12,000,000	\$12,000,000
Atchafalaya Basin Exhibits	\$6,000,000	\$6,000,000	\$6,000,000
South America Exhibits	\$5,000,000	\$5,000,000	\$5,000,000
Aviary	\$2,000,000	\$2,000,000	\$2,000,000
Upgrade Existing Facilities to Keep	\$15,000,000	\$0	\$0
TOTAL	\$68,000,000	\$53,000,000	\$53,000,000
STRATEGIC SERVICES	16.6%	27.0%	27.4%
Food and Restrooms, Gift-Buildings, Outdoor Space	\$5,150,000	\$6,000,000	\$6,000,000
Ropes Course, Zipline, Nature Playspace	\$2,000,000	\$2,000,000	\$2,200,000
Event Zone and Rental Spaces	\$1,000,000	\$3,300,000	\$3,300,000
Waterpark (Splash-Pad)	\$2,800,000	\$2,800,000	\$2,800,000
Train, Station, Carousel, Other Rides (Boats)	\$3,250,000	\$6,800,000	\$7,000,000
Destination Lodging	\$0	\$2,000,000	\$2,000,000
Education Hubs	\$4,000,000	\$6,800,000	\$6,800,000
TOTAL	\$18,200,000	\$29,700,000	\$30,100,000
	\$110,000,000	\$110,000,000	\$110,000,000

Defining & Evaluating Criteria for Success

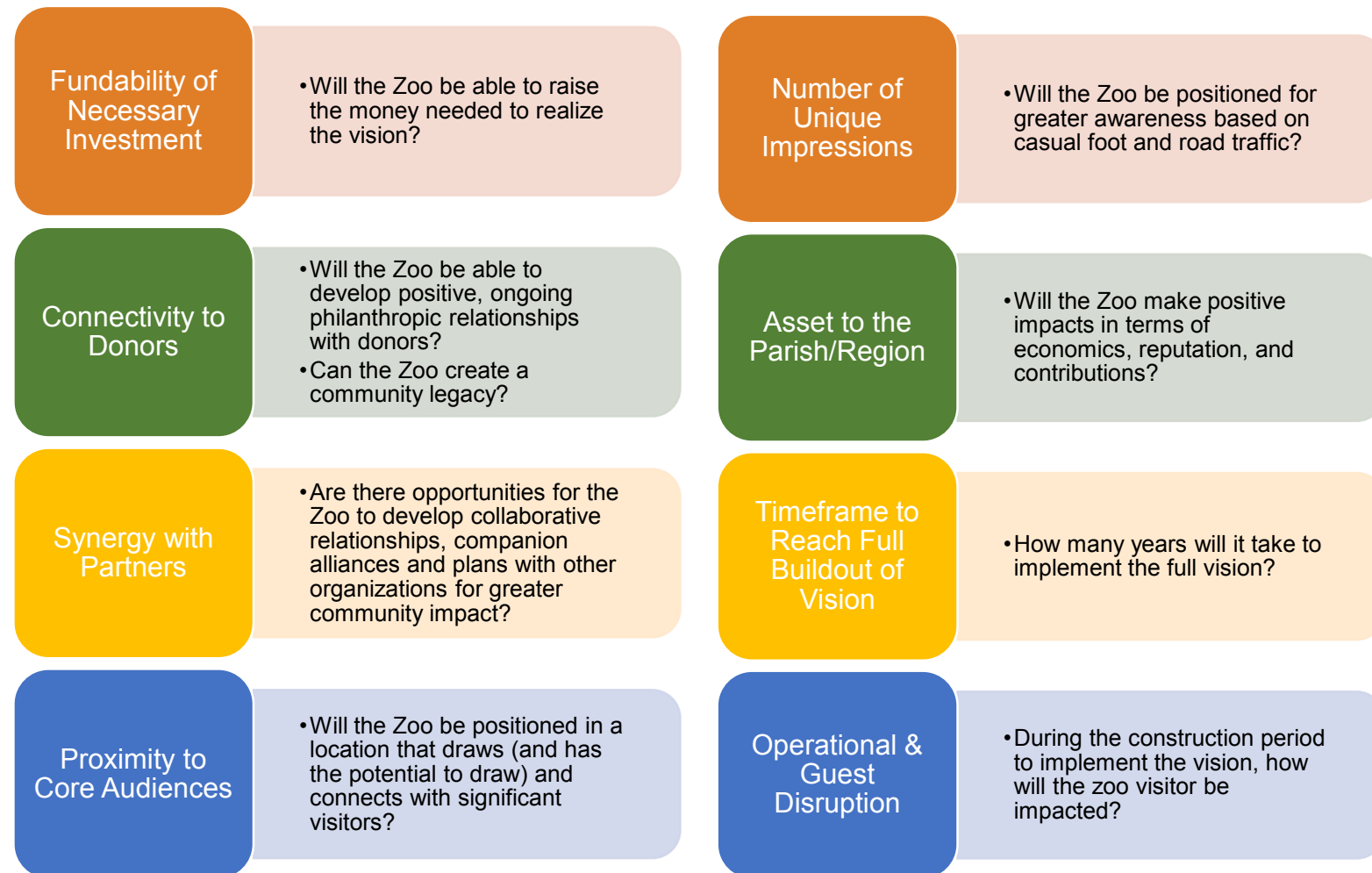
What are the specific attributes and characteristics that are absolutely vital to the success of the Zoo in terms of securing the necessary philanthropic support now and ensuring sustainability moving forward?

In order to determine that a \$110 million investment in a transformed Baton Rouge Zoo makes sense and will yield a stronger and better organization that will serve the residents and visitors to Baton Rouge for generations to come, it was necessary to define what would make the Zoo successful.

The criteria we developed are focused on securing and leveraging the long-term potential of the Zoo as a community asset, an economic driver, and a unique, engaging visitor destination for all to enjoy.

Defining Criteria for Success

Given that cost to build remains “fixed” regardless of the site, the criteria for success in priority order include:



Assessing Criteria for Success

	EXISTING SITE AT GREENWOOD PARK	NICHOLSON CORRIDOR ZONE	AIRLINE HIGHWAY PARK
MOVING FORWARD			
Fundability of Necessary Investment	Limited willingness to fund from private sector; higher reliance on public dollars NEUTRAL TO CHALLENGED	Willingness by philanthropic community to fund, which will maximize the public investment GOOD	Willingness by philanthropic community to fund, which will maximize the public investment GOOD
Connectivity to Donors	Limited willingness to donate CHALLENGED	Willingness to donate GOOD	Willingness to donate GOOD
Synergy with Partners	Limited due to distance CHALLENGED	Strong due to proximity GREAT	Good due to proximity GREAT
Proximity to Core Audiences	Far CHALLENGED	Close GREAT	Close GREAT
Visibility (Number of Unique Impressions)	Limited passing foot and road traffic CHALLENGED	Good levels of passing foot and road traffic GREAT	High levels of passing foot and road traffic GREAT
Asset to the Parish / Region	Limited visitation and community impact NEUTRAL TO CHALLENGED	Strong visitation and ability to have community impact GREAT	Strong visitation and ability to have community impact GREAT
Timeframe for Full Buildout	15+ years due to time needed to secure financial investment CHALLENGED	5 years due to strong public / private funding partnership GOOD	5 years due to strong public / private funding partnership GOOD
Operational & Guest Disruption	On-site construction NEUTRAL TO CHALLENGED	Off-site construction GOOD	Off-site construction GOOD

We determined a significant discrepancy between the existing site and any potential new site at the issue of fundability: our research throughout the feasibility study and in conversations with a variety of community leaders has led us to conclude that it would be significantly more challenging to raise funds to transform the existing site than it would be to build a newly imagined Zoo on a new site at different location within the Parish.

With viable site locations identified, the philanthropic leadership in the community should be engaged again in more specific conversations about their interest and willingness to support the new Baton Rouge Zoo.

Several of the factors potential donors mentioned as influencing their likeliness to give were identical to many of our key criteria points:

- Potential partnerships with existing community organizations/corporations that could lead to exciting collaborations and programming
- Accessibility to other cultural and recreational amenities
- Proximity to core audiences and potential new visitors, as well as to areas of projected growth in Baton Rouge
- Ability for the Zoo to be considered an asset and a driver for a growing, dynamic city
- Potential for leveraging economic impacts including infrastructure improvements, transportation options, food and hospitality offerings, and sites where lots of people are already coming

KEY FACTOR: *If private support of the Zoo would be more challenging to secure at the existing site, then it would be highly likely that the existing site would require a much higher level of public funding both for initial capital investment and ongoing operating support. This would also impact the timeline for implementation as significant public support is very challenging to secure.*

Defining & Evaluating Strategic Impacts

One of the biggest and best reasons to create a newly imagined Zoo is to enable more people to visit, have active outings with family, learn about conservation, engage with the animals, and leave with a positive impression and compelling reasons to return.

The current visitation of the Zoo is 250,000 visitors. Projections indicate that a \$110 million investment in the existing site would optimistically yield a 50% increase in visitation to 375,000 annually, while the same investment would yield a 100% increase to 500,000 or more at a new site which could leverage other existing attractions, expected population growth, and strategic partnerships with other organizations.

At Current Site

The attendance figure projections for the transformation of the current site are based on a traditional 9am-5pm Zoo experience with only limited potential for evening and off-hour events and programming.



At One of the New Sites

The 100% increase over the current baseline attendance baseline projected at a new site arises from the ability of the Zoo to leverage additional programming with 7am-10pm seasonal experiences including destination dining and lodging, evening/catering capabilities, and expanded programs such as pre-school, night tours, and special events.

The programming additions and special event capabilities are not considered to be a viable option at the current site because the core audiences do not exist and adding amenities will not create enough of a reason to visit due to location and ease of use. Furthermore, the greatest population growth is projected to be moving southeast of East Baton Rouge Parish – away from the existing site. While there is growth projected to continue in Zachary and Central, the total population is still much less than in the southeast areas of the Parish and is projected to remain less densely populated.

Another critical factor that limits the strategic impact of the new vision at the existing site is that the implementation funding will be more heavily dependent on public sources, which will probably cause full buildout to take 15 years or more to complete. This will slow the ability of that site to attract 375,000. S&W projects that implementation will have to be done over time and result in probably an initial 40-60% buildout of vision, which would attract approximately 290,000 guests until future phases are funded and completed. As stated above, with the expanded timeline for buildout, inflationary costs would impact the ability to fully invest \$110 million in the vision; therefore the experiences and attractions offered would have to be scaled down.

With the visitation impact in mind, the ability to raise at least \$25 million from private sources as an indication of philanthropic confidence and as a first step in forging a strong public/private partnership is severely compromised. Therefore, the opportunities to implement the Zoo's vision are considerably more feasible at a new site. This confidence is also swayed by the Zoo's increased ability to promote its education and conservation mission at a new site that could better accommodate more school children and a possible pre-school offering, as well as increased opportunities for retail and special events, including destination lodging and other exciting visitor amenities.

A transformed zoo experience at either the existing site or a new site would certainly raise awareness of the Zoo and of BREC's image and brand. Though added excitement would be generated if the existing site were redeveloped into a new and engaging community amenity and with the Zoo transformation occurring at a new site – essentially doubling BREC's community visibility and impact.

Key Factor: *The successful transformation of the Zoo, based on a careful assessment of the criteria and potential strategic impacts, will rely primarily on funding ability, and leveraging the Zoo's connection with its core audiences and partners.*

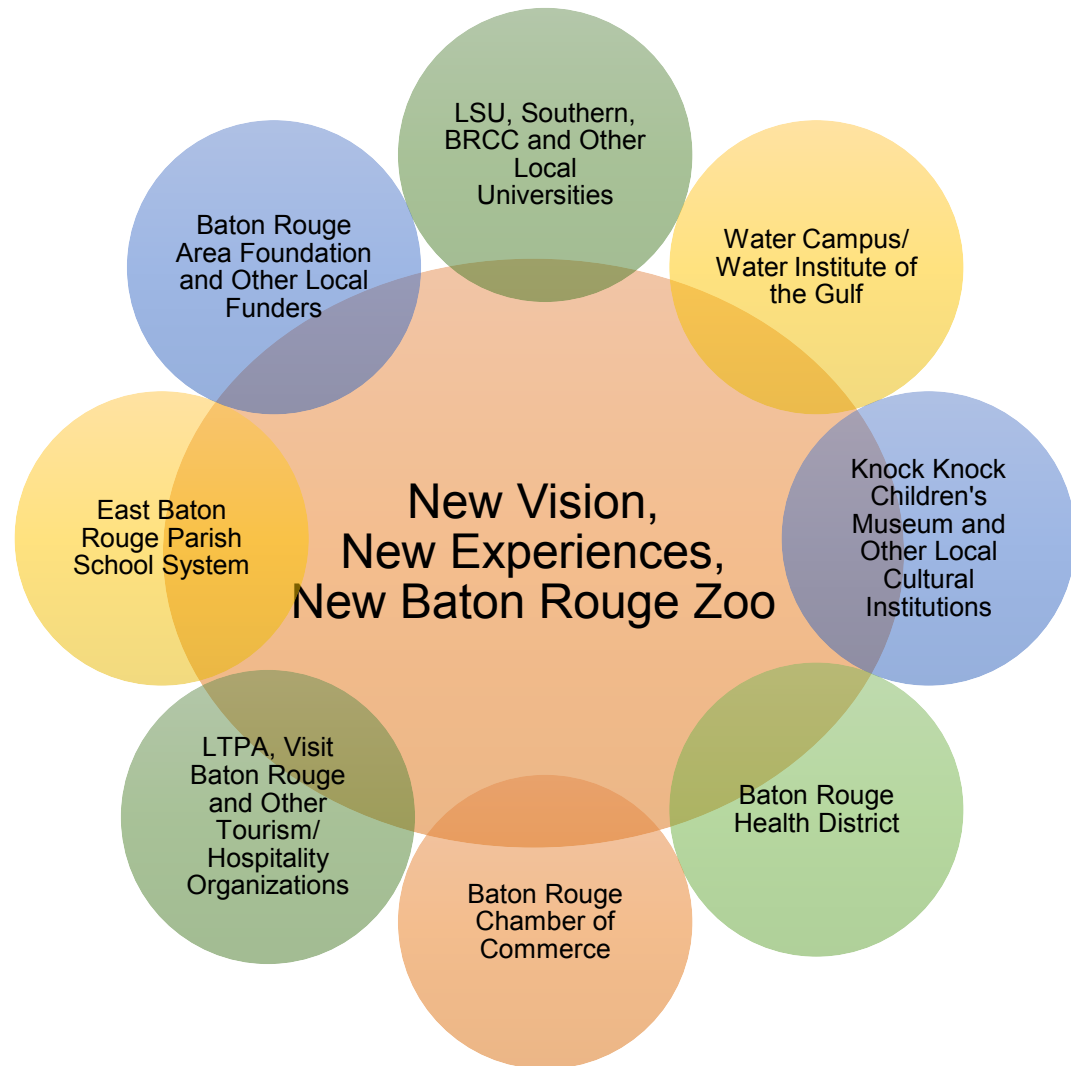


Potential Strategic Partners

In order for the transformed Zoo to play a larger role as a community stimulator and leader, the Zoo leadership will need to seek out and nurture new strategic partnerships and strengthen current partnerships.

These partnerships will create synergy that advances and raises awareness of the Zoo's mission. Working collegially, the Zoo and its partners can identify common goals and develop opportunities to align their efforts, thus creating a powerfully leveraged movement for cultural and community impact.

We were impressed and inspired by the model developed and promoted by the Baton Rouge Area Foundation for the development of the Baton Rouge Health District, Destination: The Lakes, and the Water Campus. It is that kind of collegial, synergistic thinking that will help make the Zoo's vision a reality.



The prospects for these potential strategic partnerships are incredibly exciting. Here are just a few of the many possible partnerships the Zoo should explore as it looks forward to the implementation of the new vision:

The Zoo already has a productive relationship with LSU's veterinary school. Imagine the possibilities if the Zoo were located closer to the LSU campus?! In addition to the vet school, the Zoo could function as a real-world learning lab for other LSU students as well. The Zoo could develop a mutually beneficial program for students studying business, marketing, education and more. Through this hands-on approach, the students would gain invaluable experience, while offering the Zoo a new perspective and genuine assistance with special projects and new initiatives such as the potential pre-school program. Options for class credits, apprenticeships, and/or internships could be explored and formalized in dialogue with LSU leadership.

Enhanced exhibits highlighting the Zoo's location in Baton Rouge, in neighboring to the Atchafalaya Basin, offer special opportunities to develop programming and events in concert with the Water Institute/Water Campus.

With this location right in the midst of the largest wetland and swamp in the United States, the Baton Rouge Zoo is uniquely situated to work together with these organizations to highlight the inter-connectedness of people and the natural world, especially in relation to conservation efforts.

Strategic Business Analysis & Impacts

Financial and Operational Impacts

Baton Rouge's newly imagined Zoo will contribute significantly to the region's future. Strengthened by synergistic relationships with the state, city, and fellow organizations, this transformation will position the Zoo as a vibrant destination for generations of visitors, and enhance the quality of life in Baton Rouge through education and tourism.

Currently, the Zoo has an operating budget of \$5.8 million based on receiving about \$3 million from BREC tax and support, earned revenues from 250,000 visitors, and about \$440,000 raised by the Friends of the Zoo through special events, fundraising and membership.

The new vision for the Zoo has the potential to leverage a larger role as a community asset to create a stronger and more robust financial operating model for increased viability and sustainability.

As explained in the section above based on zoos across the country with similar metropolitan area populations, including regions with multiple zoos within 100 miles, the new Zoo is projected to draw 500,000 visitors annually if at the right location.

This increase in visitation as articulated in the vision is based on broadening the audiences that the Zoo serves by expanding programming, hours, and educational services as through a pre-school; hosting retreats, special events and wedding receptions; and creating unique dining and lodging experiences – these experiences would largely be possible only at an alternative site, not the existing one. With the overall transformation of the Zoo, many of the visitors' favorite experiences will be enhanced including the train, carousel, animal feeding, behind-the scene tours and night tours. In addition, new experiences and amenities will be added including splash pads, gardens, amphitheater, zip lines and ropes courses, lights shows, and boat rides. These experiences and amenities will also support longer stay-time for visitors, more frequent repeat visitation, and increased likelihood for participation in programs.

The Zoo's funding model, while it would continue to receive BREC support, is expected to be strengthened in the following ways. Outlined below are the business planning assumptions for the new Zoo:

Operating Revenue Assumptions:

- *Earned revenue:* Earned revenue includes admission revenue, membership sales, food and retail sales, ticket sales for rides, shows, and experiences, group sales, catering and private rentals, and overnight experiences.
- *Program revenue:* Program revenue includes educational programs including a pre-school, camps, and conservation-focused outreach events and programming.
- *Contributions & Sponsorship:* Contributions and sponsorship includes private operating support from individuals, foundations, and corporations.
- *BREC Support:* BREC tax revenue is a dedicated property tax of which the Zoo receives a portion. BREC also supports the Zoo by providing the salaries and benefits for the auxiliary services provided to the Zoo through BREC. Projections for this support is based on the current 2015 budget. It is projected that the new Zoo would receive a similar level of support from BREC.

Operating Expense Assumptions:

- *Salaries & Benefits:* Salaries and benefits for all employees including the Friends of the Zoo employees, which are not covered by BREC. With the expanded visitor experience, additional staff will be needed to operate the Zoo.
- *Animal Care & Supplies Expenses:* Animal care and supplies includes all animal food, enrichment supplies, veterinary services and supplies, and any other animal care needs.
- *Operating Expenses:* Operating expenses includes marketing, development, guest services, education, conservation, technology, ride operation, and cost of goods.
- *Utilities:* Utilities include water, water treatment and electricity.
- *Maintenance & Horticulture:* Maintenance and horticulture includes all maintenance, facility support, environmental services, and horticultural goods and services.

Potential Financial Pro Forma Model for New Vision

In an effort to understand the business implications of an investment of \$110 million at each potential site, S&W outlined the following projections:

	Greenwood Park/Existing Site	Greenwood Park/Existing Site	Nicholson Corridor Site	Airline Highway Park
<i>Buildout Timeframe</i>	Initial Buildout - Partial Completion (5 Years)*	After \$110MM Full Buildout (15+ Years)	Full Buildout (5 Years)	Full Buildout (5 Years)
Attendance	290,000	375,000	500,000	500,000
Operating Revenue				
Earned Revenue	2,900,000	4,125,000	8,000,000	8,000,000
Program Revenue (Education & Conservation)	100,000	125,000	1,000,000	800,000
Contributions & Sponsorship	200,000	250,000	800,000	600,000
BREC Support	3,000,000	3,000,000	3,000,000	3,000,000
Total Operating Revenue	\$6,200,000	\$7,500,000	\$12,800,000	\$12,400,000
Operating Expenses				
Salaries & Benefits	3,800,000	4,300,000	7,650,000	7,400,000
Animal Care & Supplies	500,000	600,000	700,000	700,000
Operating Expenses	1,000,000	1,500,000	2,200,000	2,050,000
Utilities	400,000	500,000	900,000	900,000
Maintenance & Horticulture	500,000	600,000	1,100,000	1,100,000
Total Operating Expenses	\$6,200,000	\$7,500,000	\$12,550,000	\$12,150,000
Net Operating Margin	\$0	\$0	\$250,000	\$250,000
Economic Impact with \$110 Million Investment**	\$138.1MM	\$230.2MM	\$230.2MM	\$230.2MM
Economic Impact Annually	\$21.4MM	\$23.9MM	\$34.1MM	\$33.3MM
Personnel Earnings Annually	\$7.4MM	\$8.3MM	\$11.9MM	\$11.6MM
Jobs Supported Annually	214	243	360	351

*Based on the dependence on public support, which is more difficult to secure, to implement the \$110 million vision, it is projected that the Zoo will only be able to buildout 40-60% of the vision within five years from site selection.

** Total economic impact based on an one-time capital investment of \$110 million.

The major distinction between the existing site and the other available sites is visitation, which will be based on proximity to primary audiences and partners and ability to implement all elements of the vision.



The operating potential and economic impact of the two alternative site locations is greater than the existing site primarily due to proximity to core audiences and partners. Also, it is unlikely based on population demands that a pre-school will be able to generate positive net revenue at the existing location. Also, because the convention and tourism business is stronger in the central and southern ends of the Parish, a destination lodging experience would be unlikely to be viable and sustainable at the existing site.



Conclusion

Since status quo is not an option, change MUST occur. The status quo at the existing Zoo site is not sustainable and investment in the status quo is not a responsible financial decision.

The condition of the Zoo and its facilities - through aging, deferred maintenance, changes in best practices in animal care and higher expectations in visitor services and amenities – would require a significant upgrade.

In addition, the Zoo's existing location is not ideally suited to take advantage of population shifts and growth expectations, interstate tourist routes, and proximity to potential strategic partners that would advance the Zoo's mission while creating a powerful synergy that would have exponential impacts on the region's economic, cultural, and tourism realms.

Taken all together, these issues raise serious concerns that need to be recognized by the community about making long-term investments in the existing site.

The potential new sites better serve and support the entire East Baton Rouge Parish by allowing the Zoo to truly reach its potential in having a positive impact on the quality of life in the region.

From this conceptual facility and site planning project, the key findings demonstrate there are significant challenges with implementing the full vision of a new Zoo at the Greenwood Park site.

Without a strong public/private partnership to both fund the initial investment and operating and capital needs in the future, the vision is unlikely to become a reality.

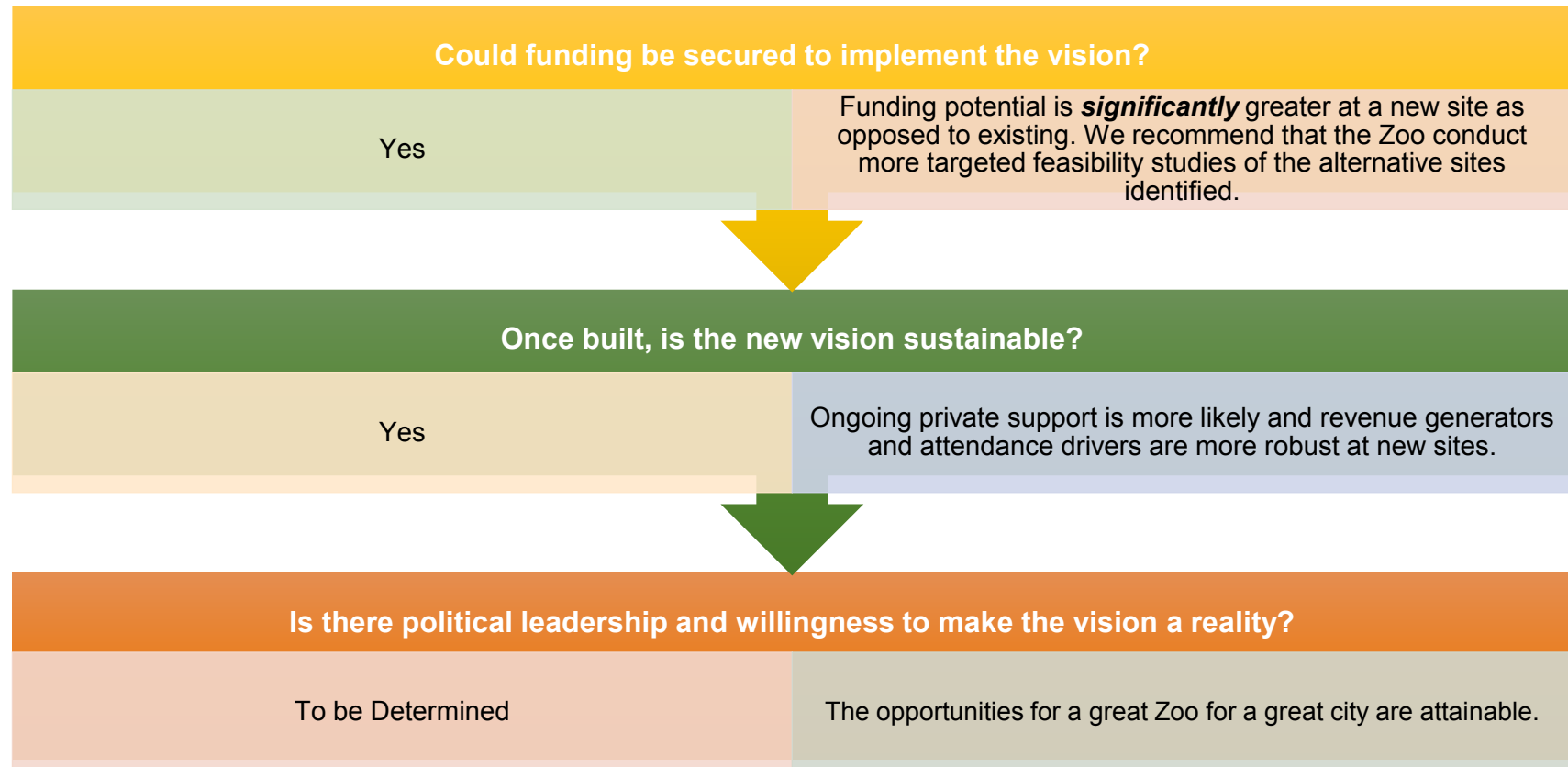
Potential donors express a significantly greater willingness to invest in a new site for a transformed Baton Rouge Zoo.

Therefore, at this time, we recommend that the existing site be eliminated as a possibility and the Zoo instead focus on determining which of the two remaining potential site areas or any additional sites identified offers the Zoo the best potential for successful operations for generations to come.

With alternative site availability confirmed, the two key questions about the fundability and sustainability of these potential sites can be answered with a resounding **YES**.

The final key planning question about political leadership and willingness remains open at this time.

Strategic Feasibility Planning Questions



BREC's main challenge in the coming months will be to ensure that those who play leadership roles in local/regional politics understand the issues that are driving this initiative and appreciate its potential impacts on the local economy, cultural fabric, recreational opportunities and community-centered engagement of East Baton Rouge.

Next Steps to Realizing the Vision

Communication, cultivation and collaboration will be BREC's primary tools in taking the necessary next steps on the path to realizing the vision.



It is critical for the Zoo to be in control of the messages to the community and to ensure its broad dissemination through a variety of vehicles. Given the lean internal staffing levels and the importance of this work, we expect that an external marketing/public relations partner would be engaged to increase the bandwidth in awareness building, communications, and media relations. Working from the existing vision statement, a dynamic and cohesive message should be shared with all existing and potential stakeholders.



Closing Recommendations

We further recommend that the Zoo update the initial feasibility study by re-engaging a broad cross-section of the community and philanthropic leadership and to determine the true willingness of the community to fund a newly imagined Zoo and at a specific location. Throughout 2015, the Zoo conducted only limited surveying of on-site visitors as well as a market research study of a few hundred neighbors of the existing site/Greenwood Park. As part of our work, we have met with a variety of community leaders and potential donors, but a significant amount of attention must be paid to gathering additional community input. The community's voices must be heard and they must be engaged in and valuable to this process.

We recommend that the Zoo continue to encourage and initiate as much dialogue as possible with all of its stakeholders – visitors, members, current donors and strategic partners, potential donors and strategic partners, local and regional politicians, and community leaders.

While undertaking this bold initiative, BREC should remain focused on making the most of this opportunity to embrace change and position the Zoo for a dynamic, viable and sustainable future. The Zoo has untapped potential to play a larger role for the East Baton Rouge Parish and the entire region while advancing its mission. We are excited by the possibilities ahead for the Baton Rouge Zoo and are eager to see this initiative move forward.



Acknowledgements

Planning Steering Committee

S. Dennis Blunt, Partner, Phelps
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Rep. Garret Graves, US Congress 6th
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Scott Hensgens, Managing Partner,
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Gail O'Quin, Community Volunteer

Sue Rainer, Community Volunteer

Nadine Russell, Community Volunteer

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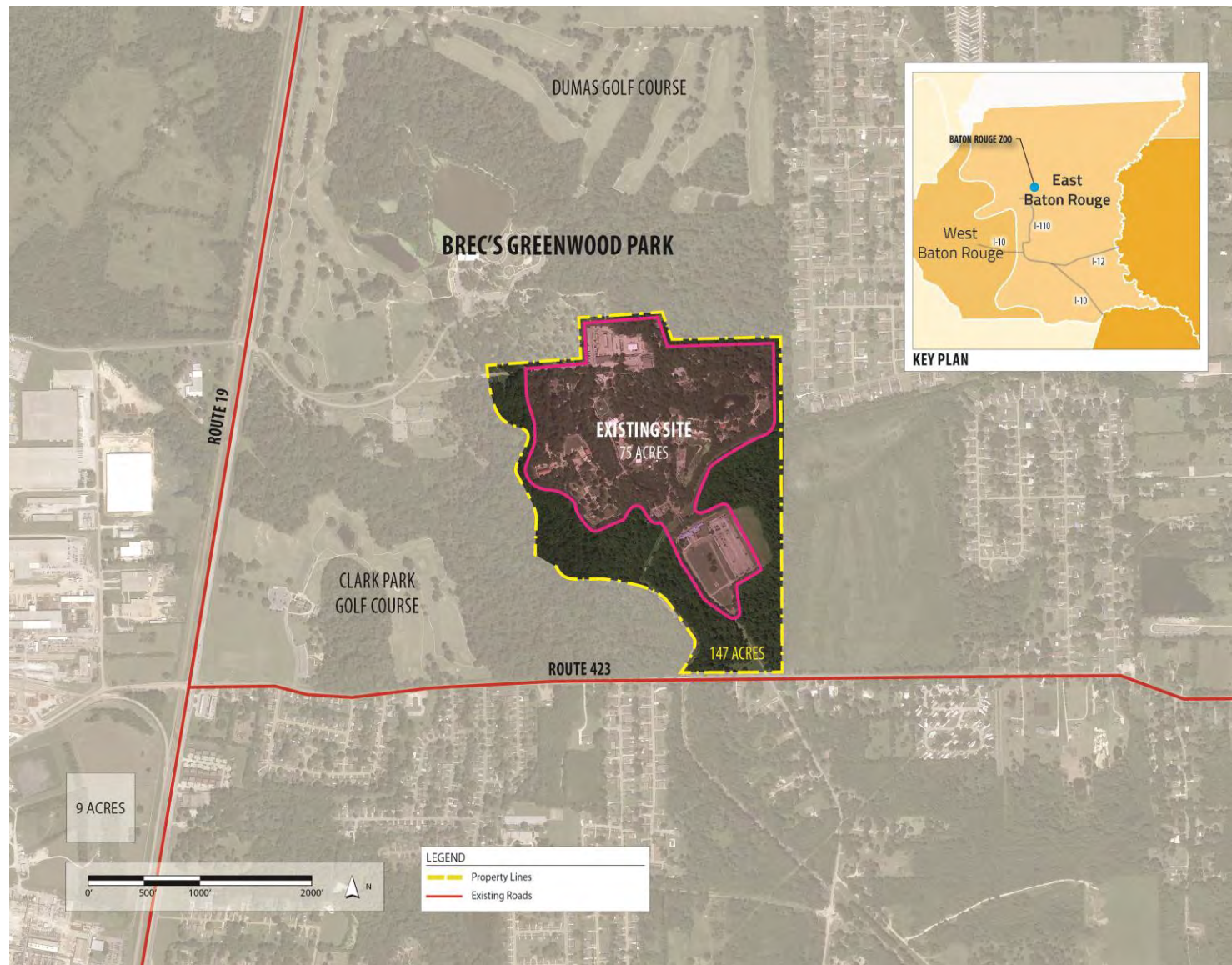
Mike Wampold, Chairman and CEO of
Wampold Companies

Schultz & Williams (S&W) and CLR Design (CLR) appreciates the opportunity to work with the Friends of the Baton Rouge Zoo, who raised the funds to pay for this planning project, the Zoo staff and the Steering Committee.

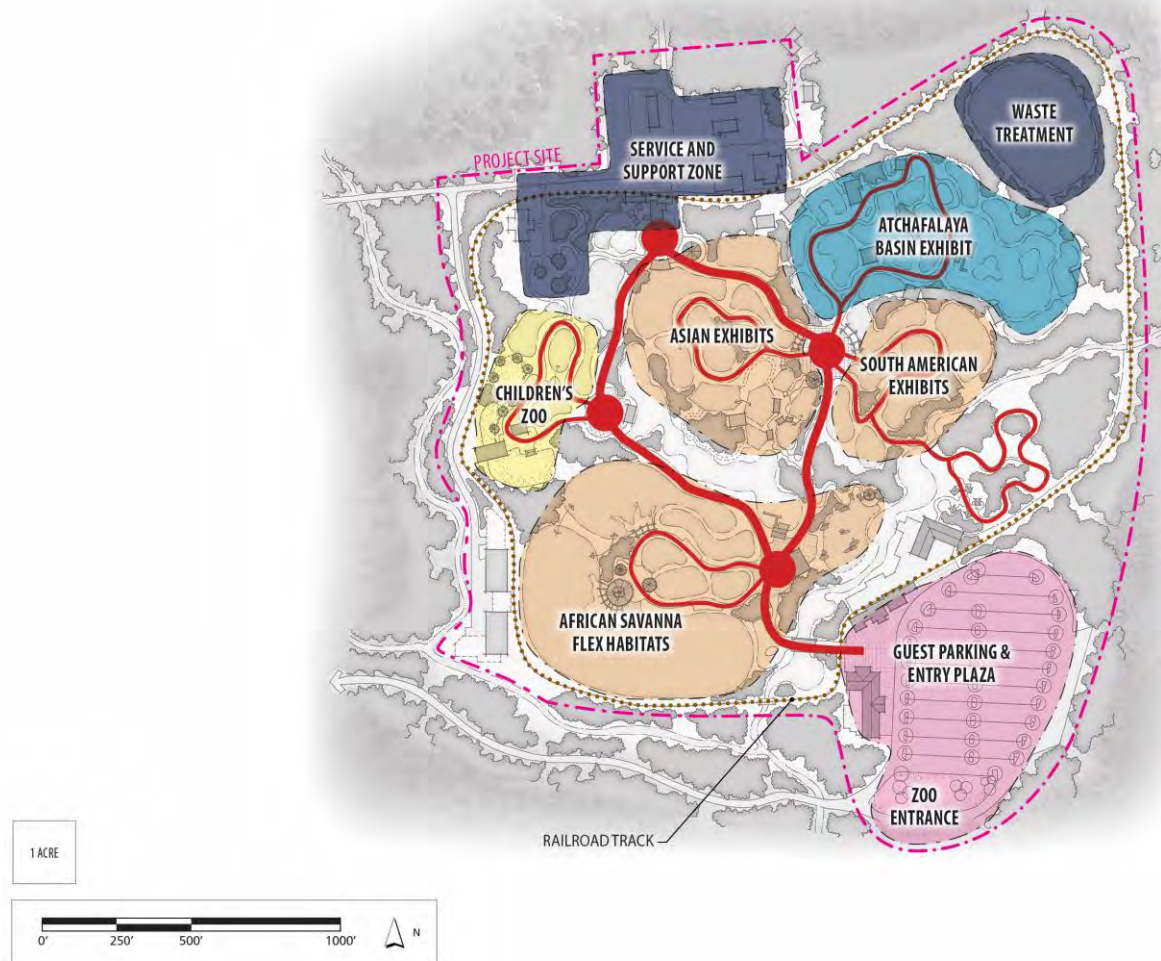
We commend the entire Friends of the Zoo Board of Directors along with the Zoo Executive Director Phil Frost and BREC's Superintendent Carolyn McKnight for their leadership and willingness to lead this effort in support of a transformation of the Zoo. S&W expresses particular thanks to Kaki Heiligenthal, Director of Marketing and Development of the Friends of the Zoo, for her ongoing assistance in managing all of the moving parts that were vital to our work.



Conceptual Plan: Existing Site at Greenwood Park – Existing Conditions



Conceptual Plan: Existing Site at Greenwood Park -- Conceptual Site Diagram



Conceptual Plan: Existing Site at Greenwood Park – Illustrative Site Plan

