

REVOLUTIONARILY ORIGINAL

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GOLF COURSE
INDUSTRY

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WE PLAY GOLF, THEY PLAY PERFECT

The calendar year is almost done, the “race to the FedEx Cup” is over, and it recently occurred to me that for the past 12 months I have seen nothing but perfect courses being attacked by the world’s best players. Is this really golf?

Think about it. The pros travel with entourages that include personal trainers, chefs, swing coaches, mental gurus, and a convoy of club and ball manufacturers who regularly tweak and refine the equipment that these golfers use. Their every request is answered, every wish fulfilled.

While it gives me hope that I might one day hit just one shot as purely as they strike nearly every one, their skill and privilege cause me to pause and consider: Is this really golf? Could the game’s finest actually play on the same types of courses and under the same conditions you and I face each and every round?

If you tuned in any week of the year, be it the smallest-market event or one of the majors or the Ryder Cup, you were witness to the results of heroic efforts put forth by superintendents and crews who were able to create excellent playing conditions. Not a week went by that we didn’t see – and they didn’t play – perfect conditions (weather permitting, and even then, a challenged course was given time to heal while the golfers were able to repair to the dry, warm comfort of a locker room).

I see these phenomenal players and perfect courses and I’m motivated to get out there and play myself. But what I have come to realize is that while they may be playing perfect golf, it is not real golf.

When I head out to play on any given day I have almost no idea what conditions I’ll find. That applies to green speeds, bunker conditions, height-of-cut, rough (or not), mowing

patterns – you name it. I’m lucky enough to travel across the country consulting, giving speeches, meeting with superintendents and others and, of course, playing. When I head out to a course whether it’s in Los Angeles or Lincoln, from Portland, Maine, to Portland, Ore., I know I’m going to encounter a wide range of conditions, grasses, set-up philosophies, and putting greens. It’s part of my personal challenge, and in all honesty, part of the fun. As a result, I never complain because I understand the difficulties that every superintendent has to deal with. Furthermore, I’m happy just to be out playing.

Superintendents, in particular, shouldn’t put so much pressure on themselves, and their crews to create **superhuman conditions**.

You think today’s PGA Tour player likes going from bent grass to Bermuda, from fluffy white sand to coarser darker grit, from one length of rough to another? Not really. Do you think that same pro could handle the conditions that we real golfers experience from week to week?

Not a chance.

They putt well because the greens are the same speed, week after week. Yes, they face rare exceptions such as at the two Opens or the Masters. But, what if they – like we – encountered different green speeds from hole to hole on the same course? You’d witness a nuclear meltdown right then and there.

I had the honor of working for Byron Nelson in the 1980s building Las Colinas Sports Club outside of Dallas. I remember him saying how impressed he was by the consistency of conditions the players faced week in and week out. That was in 1983.

Mr. Nelson said that in his day players would hit into bunkers on purpose because sand was more predictable than the green surrounds. He said that just a few feet off the green you could end up in anything “from a gopher hole to a tree root.”

Players today still hit into bunkers, but that’s because they find the sand explosion one of the easiest shots in golf.

On some of the courses I’ve played, neither the bunkers nor the green complexes are good. Get in the sand and I might find rakes, rocks, footprints, cigar butts, and everything except smoothly, properly raked

powder. A member of a private club recently said to me, in all seriousness, “I thought those rakes were for the grounds crew to use!”

Yet, despite the radically improved conditions (to say nothing of equipment), the scoring average on the PGA Tour has barely dropped. In 1945, Mr. Nelson’s scoring average was 68.34; in 2000, Tiger Woods averaged 68.17.

What else does the Tour player find? Teeing grounds are perfectly mown, level, and striped, plus the stripes point directly where the ball is supposed to go. Most “real” courses favor the philosophy espoused by Pete Dye, who used to aim tees wherever he wanted and say, “Let the golfer figure it out.”

What do I find? Different grass types hole to hole; varying soil firmness from fairways to approaches to putting greens to bunkers. The

(continued on page 79)

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Count on it.

CAN YOU DIG IT?

**GCI's exclusive research on trends
in renovation and construction.**

“ In the last six months – and really the past couple of months – we have been getting calls asking us to assist in small, spur-of-the-moment maintenance projects such as rebuilding a tee complex, replacing grass in a green-surround or rebuilding a couple of bunkers.”

– Bob Lohmann, Lohmann Golf Designs

Despite the lack of a full economic or industry recovery, U.S. golf courses have not been content to sit idle.

Courses have been active, engaging in any number of construction and renovation projects during the last three years, including tee and green projects as well as correcting drainage and irrigation issues. Industry experts point out that many of these often small-scale projects – outside of costly major renovations or rebuilds – stem from reasons that don't necessarily follow a course's master plan.

In August, GCI, via the online service SurveyMonkey, asked its readers about the types of recent construction and renovation projects taking place at their facilities and how those compared to those from three years ago. The data was broken down and analyzed to track trends and make correlations between all respondents, public (46 percent of respondents) and private (54 percent of respondents) courses.

Compared to three years ago, 38 percent of public and private courses report an increase in spending on renovation and construction projects in 2012. And while nearly half (46 percent) of public and private golf courses reported their 2012 capital spending budget remained static, nearly a third (32 percent) reported a boost in their funding, according to GCI research data. Courses reported, on average, earmarking around 20 percent of their overall 2012 capital spending budget for construction and renovation projects.

To add some context, the average capital budget in 2012 was \$160,724 with around 15 percent (\$25,000) allocated to renovation and construction projects, according to GCI's 2012 State of the Industry research. In comparison, equipment purchases made up 55 percent of 2012 capital spending, major irrigation upgrades made up 6 percent and infrastructure and building projects made up 5 percent, with "Other" projects – for example, tree removal, flood remediation, driving range projects, clubhouse landscaping and pond maintenance – making up the remaining 16 percent of capital spending, according to the research.

From this data, GCI extrapolates that there's a latent market of more than \$200 million for renovation, construction and remodeling projects in the U.S. golf market.

GolfScapes architect and GCI columnist Jeffrey Brauer

“ I am not sure that a full renovation pays back in this market. Whereas 10 years ago, you could spend \$5 million to \$8 million (on a renovation project) and get it back in increased play.”

Jeff Brauer, GolfScapes

IN-HOUSE ADVANTAGE

JUST SLIGHTLY MORE THAN HALF (53 percent) of golf course facilities responded they planned to do any renovation or construction work using in-house labor and expertise (see "Doing the work"), according to GCI research. However, 63 percent of public courses were more apt to do the work in-house, while 62 percent of private courses indicated they would hire a builder/contractor to do the work.

Whether to hire an outside firm or do the work in-house is an age-old question that will probably never have a definitive answer, says Justin Apel, executive director of the Golf Course Builders Association of America (GCBA).

"It is short-sighted to say there's one correct answer," he says. "We see clubs that have enough staff and in the off-season will have them involved in small construction projects to keep them busy."

He has also seen instances of construction projects bid with the caveat that the maintenance staff be utilized by the contractor to defray some of the costs. The bottom line is whether the existing personnel can handle the work without other areas of the course suffering.

"Taking ownership in your project and using your staff's talent and the facility's equipment is an opportunity for costs savings," he says. "However, you need to plan what component of the project you have the time and expertise to complete, and what component is better off left for a professional golf course builder."

"I've heard countless successful projects where the course staff prepared the project area or are on hand to assist with the labor aspect of a project," he adds. "A combination contracted and DIY project can be a win-win and ensures a successful result to any course project."

says the research parallels the trends he's experiencing and observing in the market, everything from full renovations to "cosmetic"-type improvement projects. However, he adds that in the current economic climate few courses are sold on the lasting impact a full-renovation project. According to GCI research, fewer than 10 percent of courses were engaged in any type of large-scale renovation.

"I am not sure that a full renovation pays back in this market," Brauer says. "Whereas 10 years ago, you could spend \$5 million to \$8 million (on a large-scale renovation project) and get it back in increased play.

"The days of a nearly open checkbook are gone," Brauer adds. "Although, there are some stories among architects that the ultra-wealthy clubs were never really hurt by the downturn."

Regardless of economic trends, weather and precipitation anomalies, or the number our rounds being played during the season, a golf course's infrastructure continues to age and at some point needs to be addressed if the course's leadership intends to have a viable facility, says Justin Apel, executive director of the Golf Course Builders Association of America (GCBA). Courses addressing these upgrades has played a major factor in the

recent uptick in construction work, he says.

"Many of these upgrades have been put off as long as possible," Apel says. "The competition for play and retraining memberships has been a driving factor on several projects that have come across our desk."

So how are courses investing the money they have to spend? Bob Lohmann, ASGCA, Lohmann Golf Designs, Marengo, Ill., and a frequent GCI contributor, has seen very little consistency in the types of projects his firm has engaged in the last year.

"It's kind of all over the board," Lohmann says. "In the last six months – and really the

past couple of months – we have been getting calls asking us to assist in small, spur-of-the-moment maintenance projects such as rebuilding a tee complex, replacing grass in a green-surround or rebuilding a couple of bunkers. These types of projects are \$50,000 to \$75,000 expenditures and usually address a 'pet' project of a superintendent or a greens committee and a realization from supers that they have the money in the budget to cover it."

According to GCI research, the most popular projects *du jour* are bunker and tee box construction and renovation and drainage projects. These trends remain consistent across both private

SPENDING

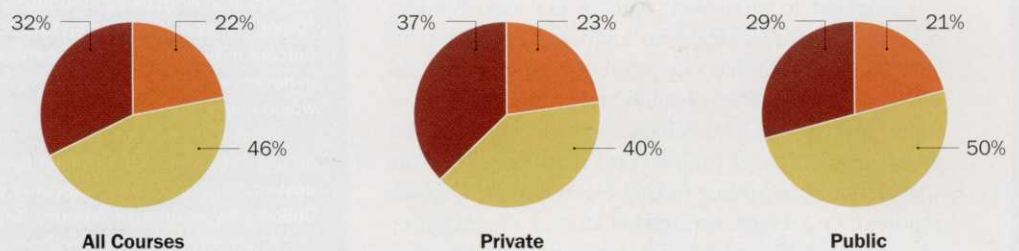
AROUND A THIRD (38 percent) of golf course facilities were spending more money in 2012 on renovation and construction projects than they did a year ago and three years ago.

Not surprising, private facilities were investing more frequently than public courses during those time periods, according to GCI research. However, three years ago, nearly half (40 percent) of private facilities cut these budgets compared to 21 percent of public courses.

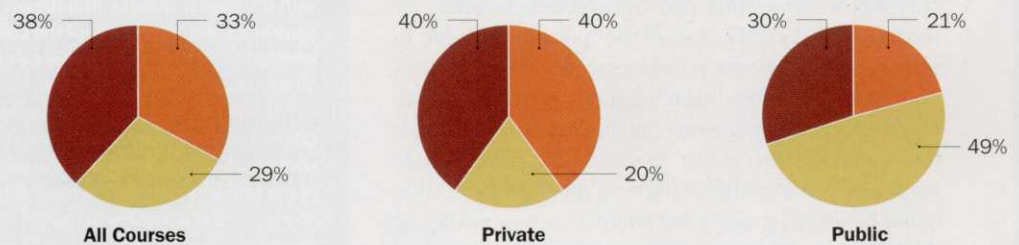
On average, courses are earmarking around 20 percent of their overall capital spending budget for construction and renovation projects, with private courses spending more (24 percent) and public courses spending less (16 percent).

Capital spending budget for renovation/construction projects: 2012 vs. 2011

Down Flat/Unchanged Up

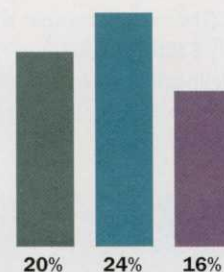


Capital spending budget for renovation/construction projects: 2012 vs. 3 years ago



Percent of 2012 overall capital spending budget earmarked for construction/renovation projects?

All Courses Private Public





and public, with the exception of an emphasis on irrigation system upgrades with private courses and cart path projects with public courses (see "Dig in," page 19).

"Cost-reduction projects remain about the same as three years ago, with bunkers leading the way," Brauer says. "At the same time, there is a small uptick on image-changing renovations, but they work hard to target spending to as little as possible to achieve the results."

Irrigation and drainage projects have been popular because these projects typically are the most

needed with courses trying to determine better ways to manage their water, Brauer says.

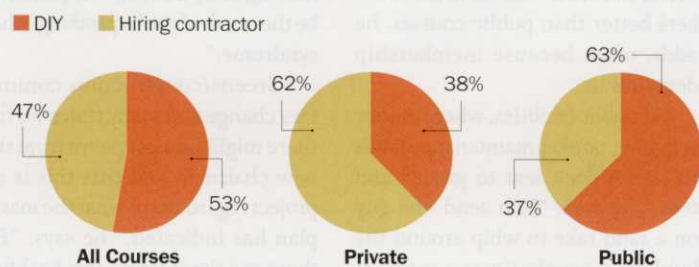
On the other side, courses report little interest in devoting money to maintenance facilities or other allied buildings. Likewise, courses report very little support for "environmental" additions or upgrades, such as installing an equipment rinse/wash pad. Apel speculates that the actual investment into "environmental" additions might be more frequent, but that these projects are actually a portion of another project, or that they were pre-existing improve-

DOING THE WORK

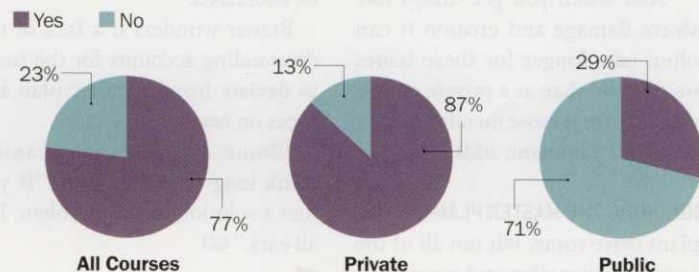
RESPONDENTS WERE SPLIT nearly evenly between whether they would do construction and/or renovation work or hire out to an outside firm. The data indicates the majority of private facilities (63 percent) would hire a contractor while more than half (63 percent) of public courses would opt to do the work in-house.

However, if contracting out the work, more than three quarters of respondents (77 percent) indicated they would hire a builder certified by the Golf Course Builders Association of America. However, private courses were more likely to choose a GCBAA-certified contractor than a public course, according to the data.

Are you doing the work yourself, or hiring a contractor?



Would you use a GCBAA-certified contractor for a future project?



Source: GCI research

THE CLEAR CHOICE

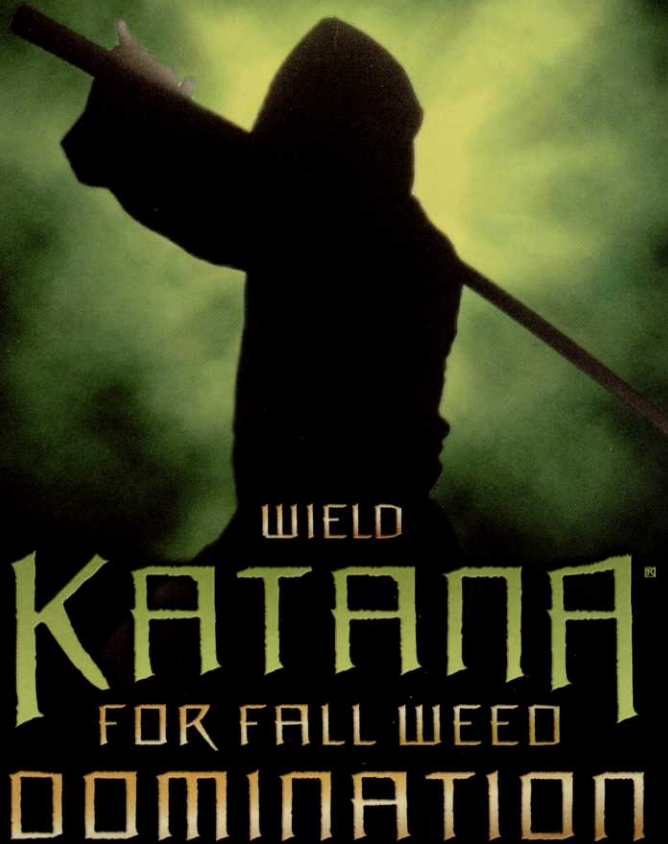


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ments made outside the scope of GCI's research. For example, a new maintenance facility built five years ago had "environmental" components as part of its overall design. The research only takes into account projects over the last three years.

PUBLIC VS. PRIVATE. So how do these trends break down between public and private courses?

Compared to 2011 spending, 37 percent of private course and 29 percent of public courses reported spending more in 2012 on renovation and construction projects. Likewise, this same trend is observed when compared to spending three years ago, with 40 percent of private courses and 30 percent of public course reporting an increase in spending. Altogether, these project investments represent, on average, about a quarter (24 percent) of a private club's and 16 percent of a public club's overall capital spending budget.

In general, public courses are investing in bunker projects because bunkers tend to get the least attention at these facilities, Lohmann says, especially those courses with minimal maintenance budgets. Private courses will maintain bunkers better than public courses, he adds, often because membership demands it.

"At public facilities, where money is tighter, bunker maintenance tends to take a back seat to greens and tees," he says. "You send one guy on a sand rake to whip around the bunkers a couple times a week. It doesn't take long for neglected bunkers to become bigger maintenance problems.

"And when you get things like storm damage and erosion it can often take longer for these issues to get fixed than at a private course where there is more member/player scrutiny," Lohmann adds.

IGNORING THE MASTER PLAN. Master plans drive some, but not all of the recent construction and renovation projects taking place on courses.

In fact, the research indicated that about a third of the time did any of the recent construction or renovation projects coincide with the scope and/or direction of the facility's master plan.

The trend with courses is to focus on smaller projects and not comprehensive master planning.

Instead of master plans, Lohmann's firm has been doing more smaller "asset-management plans" which are more about identifying future maintenance concerns or small cosmetic changes that can be completed in-house and stretch the dollars and cents of small investments.

"Clubs are still wary of making big investments in an economic climate that remains iffy," Lohmann says. "Long-range plans generally center around large-scale investment projects."

And small, spur-of-the-moment projects might be an indication that clubs are starting to have some extra money to slowly start reinvesting. "But it is taking baby steps... and they want to get all they can out of that money, hence the reluctance to invest in planning," Lohmann says.

Apel speculates that this trend of moving away from master plans may be the result of the "squeaking-wheel syndrome."

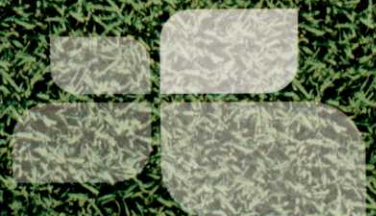
"Greens/construction committees change and many times we find there might be a pet peeve from that new chairman and that this is the project regardless of what the master plan has indicated," he says. "But there are times when this backfires and that new irrigation system that was just installed falls victim to a greens renovation and has to again be addressed."

Brauer wonders if a lack of understanding accounts for the trend to deviate from a master plan and focus on smaller projects.

"Some members just cannot think long-term," he says. "If you find a solution to this problem, I'm all ears." **GCI**

Mike Zawacki is editor of GCI.







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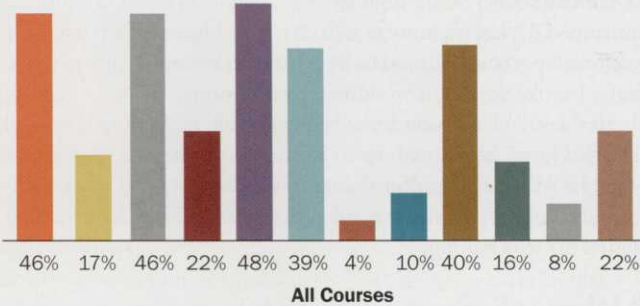
DIG IN – THE PUBLIC-PRIVATE BREAKDOWN

Bunker work is the most popular type of construction projects taking place on golf courses, followed closely behind by work on tee boxes and drainage improvements. Aside from complete course renovation and reconstruction, which only 8 percent of respondents indicated they were undertaking, the least popular projects involved regrassing, clearing, earth-moving and grading work.

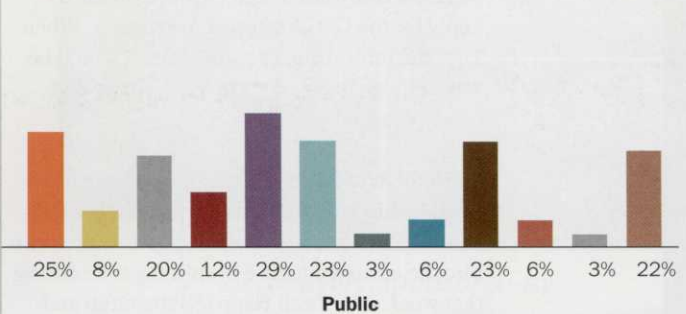
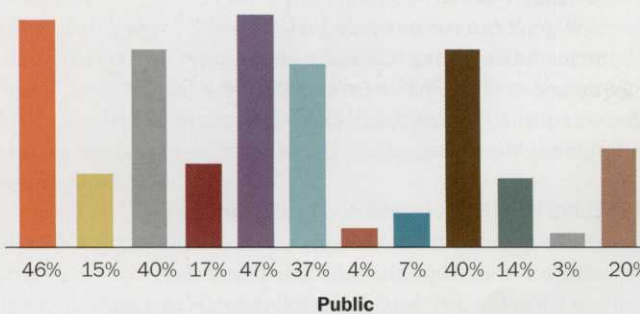
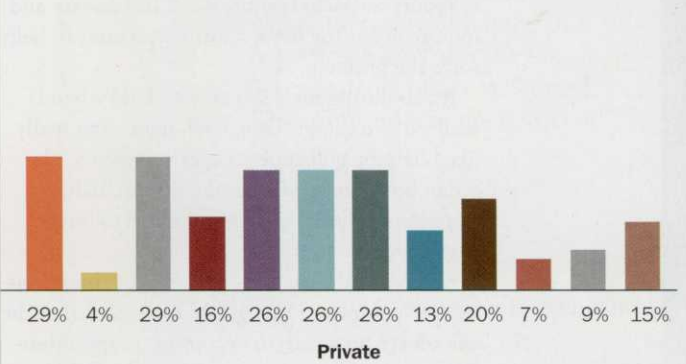
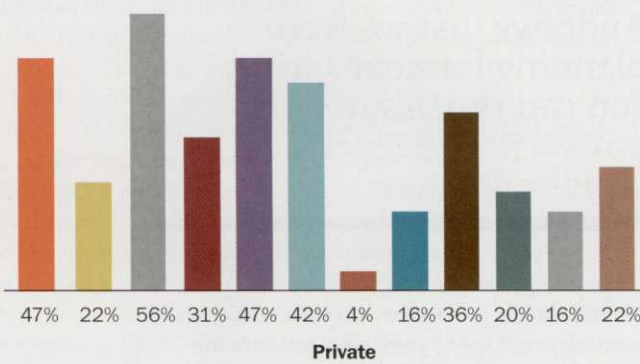
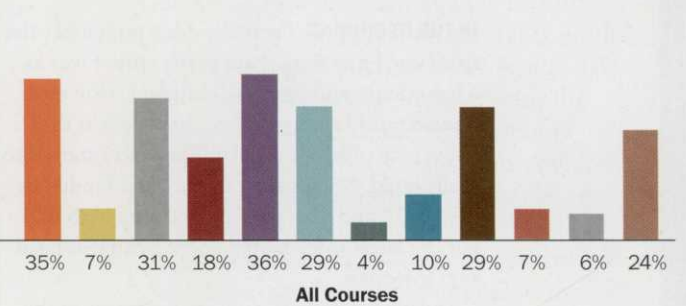
When examining the project private and public courses were engaged in, more than half of private courses (56 percent) gave drainage work a top priority, followed by bunker and tee box renovation and construction (47 percent), but also including with nearly the same frequency (42 percent) irrigation system upgrades. Similarly, public facilities placed a priority on bunker (47 percent) and tee box (46 percent) work, followed by drainage improvements and cart path projects (40 percent).

It's interesting to note that only about a third of these projects are part of a course's master plan.

Type of construction/renovation projects recently undertaken?



Construction/renovation projects that are part of a master plan?



- Tee boxes
- Clearing, earth-moving, grading
- Drainage
- Greens construction/renovation
- Bunker construction/renovation
- Irrigation system upgrade
- Environmental upgrade (rinse washpad or other)
- Maintenance facility, building structures
- Cart paths
- Regrassing
- Complete reconstruction/renovation
- Other (please specify)

Source: GCI research



John E. Kaminski, Ph.D. is an associate professor, Turfgrass Science, and director of the Golf Course Turfgrass Management Program at Penn State University. You can reach him at kaminski@psu.edu.

STANLEY J. ZONTEK

The recent passing of Stan hit me harder than I had expected. Shortly after being introduced to him by my mentor, Dr. Peter Dernoeden, I had formed one my greatest friendships. Whether it was drinking a pint, finding a job or traveling the world; Stan was always there for me.

IN THE BEGINNING. I actually don't remember the first time I met Stan. I am pretty sure it was as a Penn State undergraduate student. However, it wasn't until my graduate school days at the University of Maryland that Stan and I started to really bond. My research project was funded by the USGA and Stan would often stop in to find out the latest information about bentgrass dead spot infection.

During his visits to numerous courses in the mid-Atlantic region, Stan would often call me to report suspected outbreaks of the disease and inquire about the latest control measures to help solve the problem.

It was during my years at Maryland when I realized two things. One, how much Stan really liked helping golf course superintendents. The other, how much information Stan actually stored in his head. He never seemed to forget anything.

As a Master of Science student, my intentions were to complete my degree and go back into the work force on a path to becoming a superintendent or possibly an agronomist for the USGA. Stan saw this passion and encouraged me to apply for the USGA internship program. When I got the internship, I assumed that I would be traveling for the week with Stan, but he had other plans.

FORGING RELATIONSHIPS. Stan was all about relationship building and my internship would be no different. Instead of having me travel with him, he arranged for me to split my time during that week with Keith Happ in Pittsburgh and Darin Bevard in Maryland. After that week, I had increased my network and friendships by two.

After completing my Ph.D. in 2004, I took my first position in academia at UCONN. Knowing that I wasn't familiar with New England, Stan immediately stepped in and put me in touch with

the regional USGA agronomists in the Northeast. Shortly after my arrival, Jim Skolurski invited me to travel to regional golf courses with him to get the lay of the land and meet some regional superintendents.

Again, more friendships were made.

CAREER SUPPORT. Stan's support of my career continued during my time at UCONN and I have to admit he was influential in my return to Penn State. I spoke with him on numerous occasions about the tough decision I was facing and although I knew he wanted me to go back to Penn State, he would never offer that advice directly. It wasn't until after I made my decision that he shared his true feelings.

Although Stan will not make the trip back to St. Andrews that we were planning for next spring, you can rest assured that pints will be raised and flowers delivered.

Even after I accepted the position, Stan continued to be influential in my career. He was very well respected by the faculty and administration at Penn State and was awarded the 2007 Outstanding Alumni Award from our department. When it came time to ask for letters of recommendation for my tenure, he once again volunteered to assist. When I was granted tenure, Stan was one of the first to call and congratulate me on the achievement.

TRAVELING WITH STAN. In addition to all of the local career support that Stan had provided me over the years, it was perhaps his inclusion of me in his overseas trips that had the greatest influence. Stan is well-known for his travels around the world and particularly his infamous trips to St. Andrews.

For years I heard about the great times he had spent with various greenkeepers in the region including those at Loch Lomond, St. Andrews, Castle Stuart and many more. Even more impor-