

City of Morgan Hill Sand Volleyball Demand and Facility Analysis

May 2020

**Management
Partners**





May 13, 2020

Mr. Chris Ghione
Public Services Director
City of Morgan Hill
17575 Peak Avenue
Morgan Hill, CA 95037

Dear Mr. Ghione:

Management Partners is pleased to transmit this report regarding the potential for a sand volleyball facility in the City of Morgan Hill. We initially evaluated the demand for the sport as best we could from the available data, concluding that the sport is expanding significantly at the youth level. Further, there is no public sand volleyball destination facility in the Bay Area, although there are several sand volleyball courts in various locations.

We then conducted a potential user survey to obtain more specific information from the sports organizations and club and high school teams to more precisely determine how much of the youth recreational and tournament play might travel to southern Santa Clara County. While the survey results were limited, they did indicate while the sport is relatively new and may be growing, interest in league play and camps is not there yet to any large degree. Rather, tournament play will likely be the users of any first phase destination facility as the competitive field below the college and university level finds its place.

A key indicator that will drive growth in the sport will be certification of competitive play at the high school level. The State of Florida recognized competitive sand volleyball at the high school level, which is leading to a growth spurt in the sport. This will likely occur in California when the sport is recognized by the California Interscholastic Federation.

We appreciate the opportunity to help inform the City as you consider the development of a sand volleyball facility in Morgan Hill.

Sincerely,

A handwritten signature in black ink that reads "Jerry Newfarmer".

Jerry Newfarmer
President and CEO

Table of Contents

Executive Summary	1
Project Approach.....	5
Interviews.....	5
Data Collection	7
Case Studies	7
<i>Santa Cruz Beach Sand Volleyball</i>	8
<i>Huntsville Sand Volleyball Complex, John Hunt Park</i>	9
<i>Hickory Point Complex.....</i>	11
The Demand.....	14
Beach or Sand Volleyball?	14
Sand Volleyball Associations and Tournament Information.....	15
Youth and Adult Play	24
<i>Adult Recreational Play.....</i>	24
<i>Local Recreational Play.....</i>	25
Associated Attendance at a Destination Facility	25
Initial Demand and Focus	26
Sand Volleyball Survey	27
The Initial Focus	28
Estimated Costs and Revenues.....	30
Costs.....	30
<i>Four to Six Court Alternatives.....</i>	30
<i>Twenty Court Alternative</i>	31
<i>Maintenance Costs.....</i>	32
Revenues.....	32
<i>Local Recreational Play.....</i>	32
<i>Potential League, Practice, and Camp Play and Tournaments</i>	34
<i>Potential Players/Spectators</i>	36
A Strategy for Moving Forward	37
An Efficient and Sustainable Master Site Plan and Complex	37
An Initial Strategy	38

Conclusion.....	41
Attachment A – List of Recommendations.....	42
Attachment B – Sand Volleyball Survey Results.....	43
Section 1. Respondents' Information	44
Section 2. Survey Questions.....	46

Tables

Table 1. Volleyball Participation Growth from 2009 to 2015 (All Ages)	14
Table 2. Juniors Beach Volleyball Tournament Participation by Gender from 2018 to 2020...	16
Table 3. Juniors ¹ Beach Volleyball Tournament Participation by Maximum Age from 2018 to 2020	17
Table 4. Juniors Beach Volleyball Tournament Participant Age Ranges from 2018 to 2020	17
Table 5. Northern Californian High School Beach Volleyball Teams by Region.....	18
Table 6. Peninsula and South Bay High Schools with Beach Volleyball Teams	18
Table 7. Morgan Hill High Schools.....	19
Table 8. Juniors Beach Volleyball Tournament Facility Locations and Number of Courts	20
Table 9. Colleges with NCAA Beach Volleyball Programs in the Bay Area and Adjacent by County	23
Table 10. Cost Projections	31
Table 11. Historical Revenue (per court) for Sand Volleyball Courts in Walnut Creek and Moraga	33
Table 12. Projected Revenue for Local Recreational Play	34
Table 13. Court Rates Gathered from Sand Volleyball Facilities and Survey Respondents....	34
Table 14. List of Assumptions	35
Table 15. Potential Expected Revenue Based on Survey Results.....	35
Table 16. Potential Players/Spectators Per Year	36
Table 17. Respondent Information.....	44
Table 18. Follow-up responses from respondents interested in hosting tournaments.	47
Table 19. Follow-up response from respondents interested in hosting practice plays.	49
Table 20. Follow-up responses from respondents who are interested in hosting league play.	50
Table 21. Responses to camp play.....	51
Table 22. In general, what is the hourly rate you pay per court for similar facilities that you rent for tournaments, practice, league, etc.?	51

Table 23. In general, how many spectators might be anticipated per hour of use when you use courts for the following	52
Table 24. Responses to overnight stays.....	52
Table 25. Are there any "like facilities" in California that the City of Morgan Hill should contact to better understand use and cost patterns at their facilities?	53
Table 26. Do you know someone or an organization that may be interested in contracting with the City of Morgan Hill to manage the facility as an operator?.....	53
Table 27. Do you know someone or an organization that may be interested in sponsorships and/or naming rights for the facility?	53
Table 28. Do you know someone or an organization that may be interested in contracting to build the facility for the City of Morgan Hill?	54
Table 29. Do you know any individual(s), team(s), and/or organization(s) that may be interested in privately funding the proposed facility? If so, please identify and provide their contact information if available.	54
Table 30. Do you know any other individual(s), team(s), and/or organization(s) that the City should contact related to the possible use of their proposed facility? If so, please identify and provide their contact information if available.	54

Figures

Figure 1. Santa Cruz Main Beach Volleyball Courts Layout	8
Figure 2. John Hunt Sand Volleyball Complex Layout (Original)	10
Figure 3. Juniors Beach Volleyball Tournament Events by Month and Year from 2018 to 2020	19
Figure 4. Juniors Beach Volleyball Tournaments by Organizer from 2018 to 2020.....	20
Figure 5. Juniors Beach Volleyball Tournament Locations Map	21
Figure 6. Map of Beach Volleyball in Bay Area (Tournament Locations and NCAA/JC Colleges)	24
Figure 7. Would you or your organization be interested in renting volleyball court(s) in Morgan Hill based on the assumptions specified above?	46
Figure 8. Are there any amenities missing from phase one (based on the assumptions specified) that would need to be added for you to use the facility?	46
Figure 9. Would your organization be interested in renting space for tournaments?	47
Figure 10. Would you or your organization be interested in renting space for practice play?	48
Figure 11. Would you or your organization be interested in renting space for league play?...	49
Figure 12. Would you or your organization be interested in renting space for camp play?.....	50

Executive Summary

Leaders in the City of Morgan Hill are interested in assessing the demand for sand volleyball that might support a destination complex being constructed in the City. The City has land for potential further sports facilities as well as a capital improvement program that may support construction of a facility. The question is whether sand volleyball fits with the overall vision for the site and whether it is sustainable. A previous sports marketing study clearly established that sand volleyball is a rapidly growing sport and therefore a critical area of assessment is whether volleyball sports enthusiasts might be attracted to southern Santa Clara County for tournament, training or recreational play.

Our interviews, research and initial analysis resulted in the following major conclusions:

1. There is no public *destination* sand volleyball facility in the Bay Area, although there are courts at many different locations including colleges, universities, high schools and a few cities. Demand for these courts appears to be high.
2. The California Interscholastic Federation (CIF) has not yet recognized sand volleyball at the high school level for competition but is expected to in the future. Given the growth of scholarships at the college and university level, high schools will need to either build sand volleyball courts or use local courts.
3. Private and public high school club sand volleyball teams are significantly expanding in Northern California to meet interest and fill the void of a feeder system for the growth at the college and university level. This increase appears to be outpacing the building of necessary facilities for practice, leagues, and tournaments and is leaving teams scrambling to find places to play.
4. Adult play has a long history of venues at beaches on the coast of California. As there is currently no major “inland” complex for sand volleyball, it would be expected that should Morgan Hill develop a complex, the adult play will probably lag until adults see what Morgan Hill has to offer.

5. Though adult play will continue to grow as the sport grows at the youth level, Morgan Hill's focus should likely be on youth play at any complex to be built in the City. College and university facilities tend to stay within their own or comparable institutional sites for play, practice and tournaments.
6. Youth clubs and teams are looking for places to practice, play challenge matches against other clubs and teams, and create leagues and tournaments that can be used to develop the next level of athletes for the sport. However, Morgan Hill's geographic location may limit the amount of practice play during the week due to traffic and long travel times to get there.
7. While there is good information regarding youth tournament play in Northern California, data were insufficient to assess the number of players involved, the number of teams, whether they would travel to southern Santa Clara County to play, and how often. Additional information from the various sponsoring organizations and schools would be required to perform an in-depth marketing analysis. As is traditional with sport sanctioning organizations, they will not commit to bring tournaments to a location until the complex is completed and ready for play.
8. For tournament play in California, the average tournament for youth would be 9 to 16 teams (18 to 32 youth players), with adult tournaments as large as 80+ teams (160+ players) based on information from current tournament directors in California.
9. In speaking with governing organizations trying to determine the impact a weekend tournament has on a complex, the rule of thumb is to count 1.5 spectators per player. This means a large youth tournament of 16 teams will attract about 80 in attendance, and a large adult tournament will attract about 400 attendees.

Our initial analysis concluded that anecdotally, a destination facility could be of interest to the youth enthusiasts in the sport. Sand volleyball facilities are clearly not keeping pace with the rising interest in the sport or the play itself.

To further consider the viability of this sport coming to Morgan Hill, in early March 2020 Management Partners conducted a survey of recognized teams and organizations. The goal was to assess interest in a potential destination facility under consideration by the City from sand volleyball teams and/or organizations. Thirteen respondents indicated that:

- There is not yet enough interest in league play, practices, and camps to support building a complex.

- Tournament play has moderate interest, limited to weekend play and concentrated in the months of March through June.
- Since a team consists of two players, even tournaments that host a large number of teams do not attract the numbers of participants and spectators similar to sports such as soccer and baseball.
- The proposed complex with the amenities described in the survey would be popular and respondents did not indicate there was anything missing to keep them from participating.

A design consultant was hired by the City to work with their staff to develop some budget level cost estimates to build out the property. The cost estimates reflects a phased construction approach with development of five courts and specified amenities initially. Each successor phase would be informed by the play and activity of the previous phase. The cost estimate shows a build-out of 20 courts.

Sand volleyball tournaments can include pool play, a ladder or elimination type play, or a combination of all three. Therefore, a minimum of five to six courts would be needed for youth tournaments to be successful. Construction of a Phase I facility (up to six courts, not a complete destination facility) in Morgan Hill may be the ultimate gage as to whether it can or will be a sufficient draw for the youth market, particularly for tournament play.

Based on the survey, a phase one facility of five to six courts likely would not attract much more than youth tournaments (9 to 16 teams) at this point because the sport's breadth isn't quite there. But the numbers are growing each year and the demands for youth tournaments (in terms of the number of teams and players) in the future will grow. Assessing traffic challenges around the South and East Bay, even on weekends when tournament play would occur, will also be important.

While we have provided some *preliminary* revenue estimates for a facility of 6 to 20 courts in this report, City staff have separately developed operational cost estimates that will influence decisions about the feasibility of moving forward. If an operating analysis results in a supportable Phase I facility, then City staff could proceed to develop a plan for the site and potentially phased construction (an operating partner may be necessary even in Phase I).

While the first phase may not attract an operational partner, City staff should nonetheless explore possible operational partners to reduce the City's risk and mitigate operational costs.

Attachment A provides a list of our recommendations. This report is organized in the following major sections:

- Project Approach,
- The Demand,
- Estimated Costs and Revenues,
- A Strategy for Moving Forward, and
- Conclusion.

Project Approach

Management Partners approached this project primarily through extensive interviews, a review of data regarding current court locations and tournament activity, as well as a high-level review of several complexes. Our initial focus was to try to inform a framework for the City to move forward, and to assess the demand in this clearly growing sport. Subsequent to an interim report issued in January 2020, we conducted a survey to assess interest in a potential destination facility under consideration by the City of Morgan Hill from sand volleyball teams and/or organizations. The survey is discussed in the section titled The Demand below.

Interviews

Management Partners' project team members conducted interviews across a wide spectrum of the sport. Our objective was to gather information about the operation, use, and interest in sand volleyball should the City of Morgan Hill build sand volleyball courts. The individuals we interviewed represented City staff who would be responsible for a sand volleyball complex, advisory body members who had expressed interest in bringing sand volleyball to Morgan Hill, and representatives from various sand volleyball organizations.

The City provided a comprehensive list of coaches, private clubs, and organizations that support sand volleyball, including letters of support for what Morgan Hill is considering. Management Partners was not able to interview everyone on the list; however, the documentation of these contacts does build on the interest that has been expressed for a sand volleyball complex in Morgan Hill.

Interviews were conducted with the following individuals or organization representatives:

- Director of Community Services
- Community Services Manager
- Community Services Supervisor (2)
- Parks and Recreation Commissioner (2)
- City of Santa Cruz Park and Recreation Supervisor (2)

- Economic Development Director
- West Valley College Administrative Services
- USA Volleyball
- Northern California Volleyball Association
- City of Walnut Creek
- Town of Moraga
- Northern California High School Beach Volleyball League
- California Beach Volleyball Association
- City of Huntsville Parks and Recreation
- Sand Court Experts
- Vance Brown Builders
- Local sand volleyball coaches

The major takeaways from the interviews were:

1. Sand volleyball is a growing sport if for no other reason than the adoption of women's beach volleyball at the NCAA scholarship level in 2016.
2. There is no single governing body that oversees sand/beach volleyball. As a result, there is no single database, listing of tournaments, and/or organizing body. This can make the potential viability and financial assessment of the merits of constructing a sand volleyball complex more difficult, as there are many competing interests.
3. Although the California Interscholastic Federation (CIF) has not yet recognized sand volleyball at the high school level for competition, with the growth of scholarships available at the college and university level, recognition is expected in the future. This will grow the sport at the high school level and require schools to either build sand volleyball courts or use local public courts.
4. Despite the lack of CIF recognition, there has been a growth in private sand volleyball clubs/programs including the Northern California High School Beach Volleyball League (which has grown from 4 teams in 2017 to 71 teams in 2019).
5. It does not appear that a complex in Morgan Hill would compete with the beach volleyball courts in Santa Cruz. The events that occur in Santa Cruz have long roots in the beach volleyball culture that is Santa Cruz and are primarily geared toward adult play. Santa Cruz is currently at capacity with adult play and turns youth teams away. Some tournaments (typically sanctioned by various organizations) therefore, may choose to go to a complex in Morgan Hill should one be built. The potential capacity spillover

from Santa Cruz would likely be in the youth divisions, with interest from youth teams, clubs, and their respective coaches.

6. Competitive sand volleyball courts are being built at high schools, community colleges, colleges and universities (Notre Dame-Belmont High School, Stanford University, West Valley College, and Cal Poly San Luis Obispo). However, these courts have only limited available space that can be used by the community outside of college use. Aside from Santa Cruz, there is no other major public complex (minimum five courts) in Northern California.

Data Collection

To collect relevant information, we utilized publicly available information on the web. To identify facility locations and tournament activity, we utilized junior volleyball association websites including Northern California Volleyball Association (NCVA), USA Volleyball, California Beach Volleyball Association (CBVA), and the City's Bikeways, Trails, Parks and Recreation Master Plan. Specific information for each facility was obtained from their websites and/or phone conversations with a staff representative. This research informed the case study information collected, which is summarized in the following section.

Case Studies

Initially, Management Partners planned to identify two comparable sand volleyball facilities in California to assess the factors that led to their construction, size and amenities, and lessons learned. Since sand volleyball as a competitive sport remains in a state of infancy, we were unable to find comparable facilities to prepare case studies containing lessons learned.

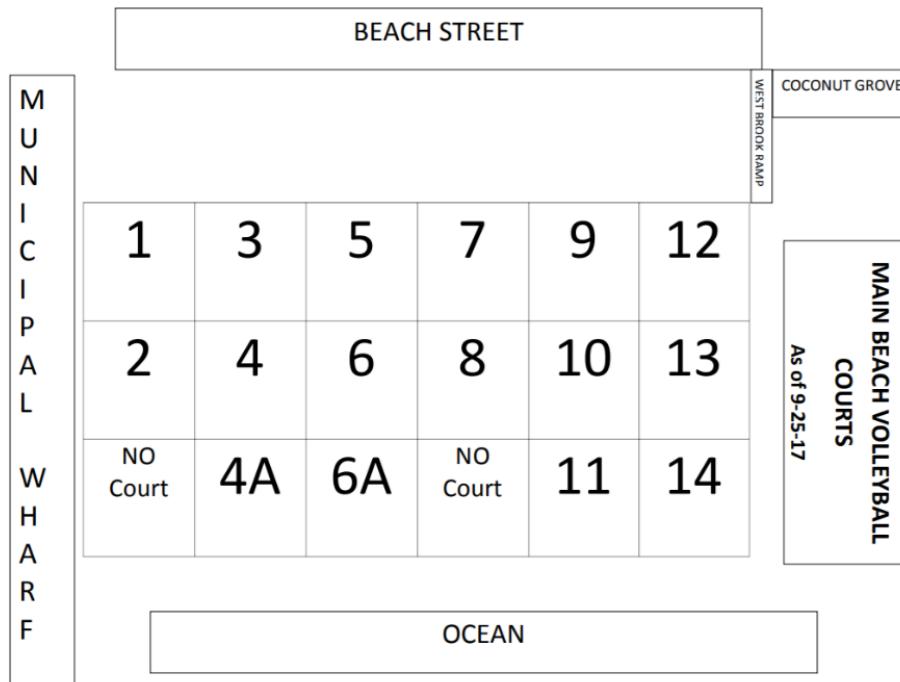
The sand volleyball courts in California are diverse in their size, quality, number, and institutional affiliation. Some facilities are located along a public beach, some are within parks, and some are on the campuses of high schools, community colleges, colleges or universities. Despite these challenges, Management Partners contacted staff representatives from two facilities in Santa Cruz, California, and Huntsville, Alabama, which operate multi-court sand volleyball facilities. The discussions did not yield operating or revenue information (Santa Cruz does not track usage or separate sand volleyball costs from general beach maintenance; Huntsville has been in operation for less than a year) but did provide some general insight about operations. A summary of the information gathered is provided below.

Santa Cruz Beach Sand Volleyball

The City of Santa Cruz has a long tradition of providing sand volleyball courts on the main beach in Santa Cruz. Historically, the courts were placed at the beach, weather permitting, with use available on a first come, first served basis. As beach volleyball became more popular, the California Beach Volleyball Association was founded in 1962. With this formation, beach volleyball leagues formed and tournaments started being held in Santa Cruz and up and down the coast of California, mostly at the adult level. The rest, as they say, is history.

The City of Santa Cruz has 16 beach volleyball courts available for rent on the main beach in Santa Cruz. All courts have professional grade nets and different heights for men and women. Parking and restrooms are located nearby on Beach Street. Court fees are \$10 per hour per court at the standard rate and \$8 per hour for nonprofit organizations. Fees must be paid when booking the reservation, which must be made a minimum of five days in advance. The City of Santa Cruz maintains the beach volleyball courts as part of its regular beach maintenance. A diagram of the courts is shown in Figure 1.

Figure 1. Santa Cruz Main Beach Volleyball Courts Layout



Note: The court layout reflects the scheduled layout. Beach and weather conditions may result in a different configuration.

In recent years the City has tried to balance having courts available for first come, first served use and scheduled use. The City can set up a

maximum of 16 courts; however, number and placement ultimately are determined by weather and beach conditions. The City is currently seeking approval from the California Coastal Commission (CCC) to add two additional courts (which is currently under consideration). The CCC oversight at the public beach limits what the City can do and limits their ability to meet the demand that is requested.

From a City standpoint, the courts are at maximum use and they turn away requests on a regular basis. The increased demand for use has recently been at the youth level, where more and more club teams are looking for space, including teams that are willing to drive over the hill from the San Jose area.

Unfortunately, the City does not track maintenance costs as the sand courts are one of many responsibilities of the Parks Division. The City also does not track total usage or by age group or revenue specifically related to sand volleyball.

In talking with City staff, they do not believe a complex in Morgan Hill would compete with their complex as Santa Cruz continues to be a beach destination tourist community. People play at the courts in Santa Cruz because it is tradition and a cultural experience. Even if the City is able to construct additional courts, they believe requests for use from youth clubs will continue to outpace their ability to provide space.

Huntsville Sand Volleyball Complex, John Hunt Park

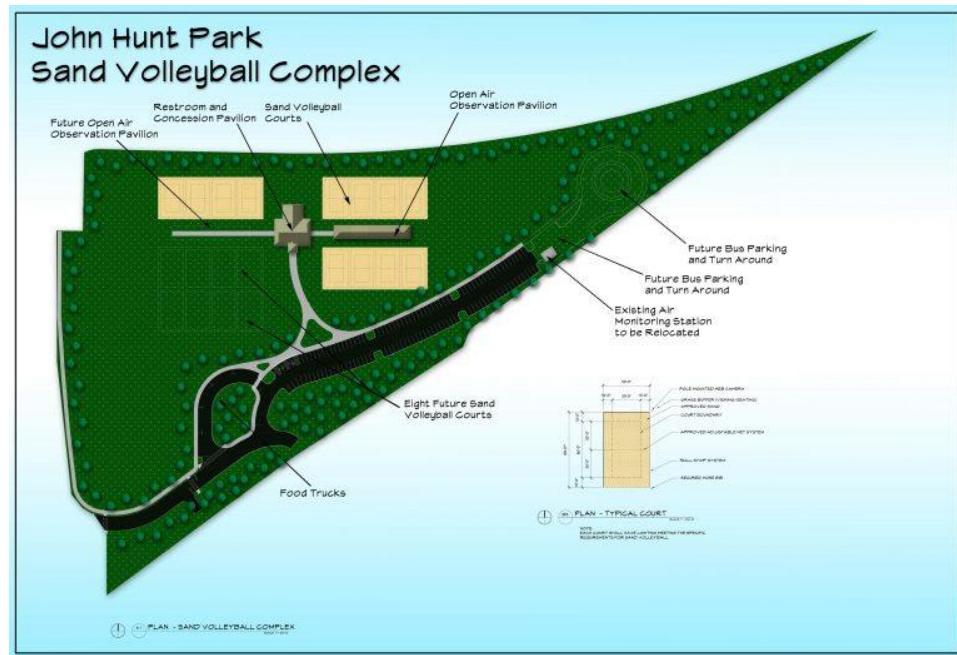
As part of the City of Huntsville's renovation of John Hunt Park, a 428-acre site in the center of Huntsville, a new 17-acre professional sand volleyball complex was completed earlier this year. This facility was created to accommodate tournament-level play and was built with additional amenities to support this mission. Amenities include the following:

- Professional level net systems
- Musco LED lighted courts
- Covered viewing area
- Wi-Fi
- Sound systems for music and play-by-play announcements
- Web cams
- Cooling rooms to keep players from overheating
- Ice machine for injury ice
- 24 inches (4,500 cubic yards) of top-grade beach sand
- Automated sand watering system
- Locker room with restrooms, showers and dressing rooms
- Concession/meet management area

- Utility hook-ups in a designated area for food trucks

Management Partners spoke with the recreation superintendent responsible for the Sand Volleyball Complex to gather more information. A figure of the original court layout is provided below in Figure 2.

Figure 2. John Hunt Sand Volleyball Complex Layout (Original)



The recreation superintendent explained that the site was finished in July of 2019 and had hosted one tournament at the time of our interview. This was an Amateur Athletic Union (AAU)-sanctioned junior's tournament for those under 18 years of age.

Upon completion of the site, the City announced an agreement with a third party to support its operation. The Huntsville Sports Commission partnered with Rally through a three-year agreement that requires Rally to host a certain number of events at the site each year, with the number of events increasing each year of the agreement. Rally is company based in Cartersville, Georgia, that appears to host volleyball events, tournaments, and camps in the south. They also host events at another facility in Cartersville, Georgia.

Following completion of the Huntsville Sand Volleyball Complex, the City learned that to host collegiate tournaments, a five-court configuration would be required. To capture this market, the City closed the courts after their first junior tournament to add a fifth court to one of the court clusters to accommodate collegiate tournament play. The City hosted its first collegiate tournament in the beginning of November 2019.

Since this complex is continuously evolving and is in its first year of operation, revenue and expenditure data were not available. The agreement with Rally was also not publicly available.

Hickory Point Complex

The Hickory Point Beach Sand Volleyball Complex is a 21-court complex located on Lake Harris at the Hickory Point Recreation Complex in Tavares, Florida. Opened in August 2014, this complex is a partnership between Lake County, Lake County Water Authority, and a non-profit arm of the Florida Region of USA Volleyball who manages the complex. The property is owned by the Lake County Water Authority who also operates the rest of the property. In addition to sand volleyball and five soccer fields, the recreation complex includes boat docks/boat ramps, outdoor showers, barbecue grills, permanent picnic tables, a swimming area, a children's play area, a two-story pavilion, nature walk, parking (which is free) and a lake.

The Sand Volleyball complex is the third-largest dedicated sand volleyball complex in the United States and the largest in Florida. It was originally approved by the Lake County Board of County Commissioners, which contributed \$398,000 to start the project from a tax charged on hotel-room stays and other tourist accommodations. The complex has professional net systems, lights, permanent restrooms, an intercom system, web cams and 24 inches of top-grade sand.

Lake County approved an additional \$1.8 million in May 2017 for construction of a 4,000 square foot field house at the sand volleyball complex. It was completed in February 2019. Additional funding came from Lake County's Tourist Development Tax. (A County Commissioner stated that since the complex opened in 2014, approximately \$1.6 million had been added to the local economy as a result.) The new field house has locker rooms, meeting space, training room, official's room, concessions and public restrooms.

At the time of the field house opening, Hickory Point had hosted 54 events, attracting players from 90 Florida cities, 25 states, and 15 countries. Some of the events that have been hosted during the life of the facility include Florida Region High School Beach Volleyball Championships (2015), East Coast All Star Championships (2016), American Beach Tour National Championships (2017), USA National Beach Tour – Regional and National Qualifiers (2018), and Inaugural High School Pairs National Championships (2019).

Individual courts are available for rental at two rates: non-profit and for-profit rates. Non-profit rates are \$65 per court per day (up to a 12-hour

period) and for-profit organizations pay \$80 per court. Discounts per court are not offered unless eight or more courts are rented.

Court rental includes:

- Net systems,
- Court boundary lines,
- Antennas,
- Pole pads,
- Use of restrooms,
- Lights (if included in the rental fee at \$25 per hour/per zone),
- Free parking (no parking may be charged),
- Trash cans,
- Water fountain, and
- One staff member (for net adjustments).

Court rental does not include:

- Volleyballs,
- Sound system,
- Cameras/live streaming,
- Officials,
- Tents,
- Ball straps,
- Stage,
- Locker rooms,
- Concession stand,
- Meeting spaces, or
- Pavilion rental (must be reserved separately).

The field house is available for rent as follows:

- Full Building: \$800 a day non-profit/\$1,000 a day for profit
- Locker/training rooms only: \$400 a day/\$500 a day
- Meeting rooms only: \$400 a day/\$500 a day
- Individual meeting room: \$100 a day/\$125 a day

To use and rent the facility, all users must abide by the following:

- Organizations interested in renting the complex are required to complete an application and execute a written agreement. Once signed, the complex schedule is updated to reflect the approved event.
- Proof of insurance must be provided by renting organizations with the application. If no insurance is available, each participant is required to purchase a USA Volleyball (USAV) membership prior to participating at \$20 per person.

- All attendees and participants must adhere to the Hickory Point park rules and no alcohol is allowed in the park without prior arrangement.
- A refundable security deposit is required for all rentals.
- Three courts are open to the public based on first-come, first-serve basis. Only courts that are reserved through the Florida Region of USA Volleyball are considered reserved and not available for public use. All rentals take priority ahead of open courts.

Management Partners reached out to Hickory Point Beach complex staff to try to obtain additional information. The executive director indicated that non-disclosure agreements prevented them from providing any information that was not readily available on the website.

The Demand

According to the 2017 Johnson Report commissioned by the City of Morgan Hill, "sand volleyball is a fast-growing sport due to the recent sanctioning by the International Olympic Committee and the NCAA." The NCAA approved women's beach volleyball as a recognized inter-collegiate sport in 2015, starting with the 2016 season. This approval included the establishment of athletic scholarships and, as a result, the fastest growing documented volleyball markets are high school level volleyball clubs.

Beach or Sand Volleyball?

Sand volleyball participation has grown across all age categories since 2009, based on information provided by the 2017 Johnson Report. A summary of the participation growth from 2009 to 2015 is provided in Table 1.

Table 1. Volleyball Participation Growth from 2009 to 2015 (All Ages)

Sport	2009 Participants (in millions)	2015 Participants (in millions)	Total Growth (2009 to 2015)	Average Annual Growth (2009 to 2015)
Volleyball (Sand/Beach)	4.3	4.8	10.70%	1.70%

Source: Morgan Hill Sports Market Study, Johnson Consulting, May 2017.

Historically in California (and other parts of the country with ocean beach access), beach volleyball is a sport that has been played in the sand on the beach near an ocean. It has culturally been an adult activity, usually played as a pick-up game. Communities and agencies would set up poles and sometimes leave nets up, and people would come and just play.

In 1962 with the formation of the California Beach Volleyball Association, the sport became more organized with leagues and tournaments. Because of the interest in the sport, "sand" volleyball has grown in locations away from a beach. This expansion in areas to play, along with the sanctioning by the NCAA as a competitive sport, has caused sand volleyball to grow, especially at the youth level, and allows the sport to be played anywhere there is interest.

Culturally, though beach and sand volleyball have the same roots. It is the ability for sand volleyball to be played anywhere (including some indoor venues) that is the reason more communities are looking to build facilities.

In most sports at the college or university level where scholarships are offered, the high school level is the training ground, either through high school competitive sports or private clubs. For sand volleyball, there was not any recognized association of clubs in California until the Northern California High School Beach Volleyball (NCHSBV) league was founded in 2017.

As sand volleyball is still not a high school program in California, the NCHSBV league has grown in the past three years from four teams in 2017, to 32 teams in 2018, and 71 teams in 2019. The season ends with a tournament that sends the Northern California winner to play against a winner from Southern California. In speaking with league officials, continued and significant growth is expected over time and has already outpaced the ability to find practice and game facilities.

Additionally, as with most sports, private “club” teams are formed that practice and compete against other clubs. The Bay Area has several clubs that are looking for space to practice and compete. Like the NCHSBV league, the clubs are finding it difficult to secure space. However, we are unable to determine what the potential for this market really is.

Sand Volleyball Associations and Tournament Information

While sand volleyball remains an emerging sport, there are formal associations that operate or sponsor the sport within California. They are:

- **USA Volleyball** is a non-profit organization that is formally recognized as the national governing body of volleyball in the United States by the Federation Internationale de Volleyball and the United States Olympic Committee (USOC). USA Volleyball represents both sand and indoor volleyball.
- **Amateur Athletic Union (AAU)/Club programs** exist in the form of individual club teams. AAU also hosts various tournaments, including junior Olympic games to provide opportunities for teams to pursue collegiate level play.
- **NCAA sand volleyball programs** are present in more than 90 colleges throughout the country at the Division 1, 2 and 3 levels, with 62 located in California.
- **Junior colleges** also offer sand volleyball programs, with 38 junior colleges in California.

- **Northern California Volleyball Association (NCVA)** incorporated as a non-profit corporation in 1982, under USA Volleyball. The NCVA operates separately than USA Volleyball, but abides by their set rules. The NCVA hosts and approves competition, fellowship play, clinics, and league tournaments. The NCVA hosts three National Qualifying Tournaments for USA Volleyball and aids in the development of players, coaches, referees, and scorekeepers.
- **California Beach Volleyball Association (CBVA)** is a non-profit corporation created in 1962 to conduct outdoor volleyball events. It hosts over 1,000 tournaments each year across more than ten skill or age divisions, in more than 21 locations. It has nearly 8,000 active members.
- **Northern California High School Beach Volleyball League** was created to form “club” teams at local high schools. Starting with four teams in 2017, the league has grown to 71 teams in 2019 and ends the season with a tournament that has Northern California teams compete against teams from Southern California.

Of the Juniors Sand Volleyball Tournaments, most events are for girls only, representing 81% of all tournaments in Northern California from 2018 to 2020. Table 2 shows a breakdown of the Juniors Beach Volleyball tournaments by gender.

Table 2. Juniors Beach Volleyball Tournament Participation by Gender from 2018 to 2020

Genders Included	Number of Events	Percent of Events
Girls Only	174	81%
Both	38	18%
Boys Only	3	1%
TOTAL EVENTS	215	100%

Source: Juniors Beach Volleyball Tournament website.

Note: Inclusion is based on participant classes. Participant groups are classed by gender and age.

Table 3 shows the Juniors Beach Volleyball tournaments by age. The majority of tournaments falls in the 18 and under category, representing 65% of all tournaments from 2018 to 2020.

Table 3. Juniors¹ Beach Volleyball Tournament Participation by Maximum Age from 2018 to 2020

Maximum Age	Number of Events	Percent of Events
10U	0	0%
12U	8	4%
14U	32	15%
15U	2	1%
16U	34	16%
18U	139	65%
ALL	215	100%

Note: Event age brackets include all ages up to the indicated (e.g., 15U includes all players up to age 15).

¹*Juniors classifications are designated by a number representing age, and a "U" for "Under" (e.g., 12U is for players aged 12 and under). Any player may participate in any bracket where they fall beneath the maximum age. (For example, a 16-year-old could participate in an 18U bracket if the event does not include a 16U bracket.) Not all girls' events include all brackets. Events that include boys are fewer and all but three include all ages.*

While Table 3 shows tournaments by the maximum age, Table 4 shows the breakdown in tournaments by the actual ages. Here, most age ranges are much younger, with 69% of events hosted for youth between 13 and 14 years of age. The total adds to more than 215 events for the period as most events host multiple age brackets.

Table 4. Juniors Beach Volleyball Tournament Participant Age Ranges from 2018 to 2020

Specific Age Brackets	Number of Events	Percent of Events
10 and Under	25	12%
11 to 12	102	47%
13 to 14	148	69%
15	30	14%
16	153	71%
17 and 18	139	65%

In addition to the tournament facility data, we collected information on which high schools in Northern California have club-level volleyball players. Again, these data do not include the number of teams or players but offer insight into where the players attend high school. A total of 60 high schools have club sand volleyball teams. Their distribution by region is provided in Table 5.

Table 5. Northern Californian High School Beach Volleyball Teams by Region

Region	Number of High Schools
Central Valley	2
Chico	1
East Bay	17
Monterey	1
Napa Valley	2
North Bay	5
Peninsula	17
San Francisco	4
Santa Cruz	8
South Bay	3

Source: NorCal Beach Volleyball High School League Website.

Most of the demand for sand volleyball is in the East Bay and the Peninsula; the South Bay only has three high schools with teams. Due to the lack of undeveloped land, Morgan Hill may be able to capture some of the demand for practice play from the Peninsula though it may be more difficult to attract the schools located in the northern portion of the region. Tournament play typically occurs on weekends and may draw from a larger geographic area, including the East Bay.

A list of all high schools with beach volleyball teams from both the Peninsula and South Bay regions is provided in Table 6. The last column indicates whether the schools are located within 40 minutes of Morgan Hill to better assess the feasibility of using the courts on a weekday. The check marks (✓) show those schools that are located with less than a 40 minute commute on a weekday. By factoring in the weekday commute times, we expect only 3 of the 19 schools with beach volleyball teams would be able to utilize the courts during the week.

Table 6. Peninsula and South Bay High Schools with Beach Volleyball Teams

High School Name	City	Region	Within 40 minutes
Aragon High School	San Mateo	Peninsula	
Carlmont High School	Belmont	Peninsula	
Gunn High School	Palo Alto	Peninsula	
Harker School	San Jose	South Bay	✓
Hillsdale High School	San Mateo	Peninsula	
Homestead High School	Cupertino	Peninsula	
Los Altos High School	Los Altos	Peninsula	
Los Gatos High School	Los Gatos	South Bay	✓
Menlo Atherton	Atherton	Peninsula	
Menlo School	Atherton	Peninsula	
Mountain View High School	Mountain View	Peninsula	
Notre Dame Belmont	Belmont	Peninsula	
Nueva	San Mateo	Peninsula	

High School Name	City	Region	Within 40 minutes
Palo Alto High School	Palo Alto	Peninsula	
Sacred Heart Prep	Atherton	Peninsula	
Saint Francis	Mountain View	Peninsula	
San Mateo High School	San Mateo	Peninsula	
Valley Christian	San Jose	South Bay	✓
Woodside High School	Woodside	Peninsula	

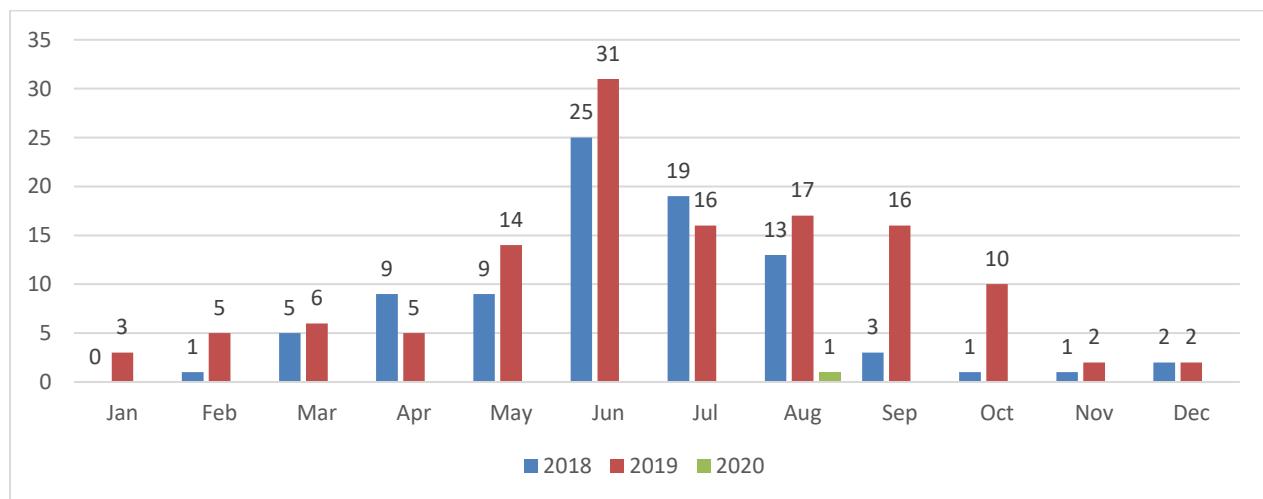
In looking at the high schools closest to Morgan Hill, six are within or adjacent to Morgan Hill City limits. The high schools, along with their estimated enrollment are listed in Table 7. To our knowledge, these schools do not have sand volleyball programs.

Table 7. Morgan Hill High Schools

High School Name	Public/Private	Grades	Estimated Enrollment
Oakwood	Private	PK, K-12	495
Ann Sobrato High School	Public	9-12	1,484
Live Oak High School	Public	9-12	1,163
Central High School	Public	10-12	147
Shadow Mountain Baptist School	Private	PK, K-12	117
Spring Academy	Private	2-12	31

To inform our assessment of the demand for junior volleyball play (for players under 18 years of age), we collected tournament information from relevant websites. Figure 3 shows a summary of the existing NorCal Juniors Beach Volleyball tournament activity from 2018 to 2020 (to date). Juniors Beach Volleyball clubs are those with players under 18 years of age. The data show a high season from May to October, with an average of 17 events per month in the high season of 2019, up from an average of 11 events per month in 2018.

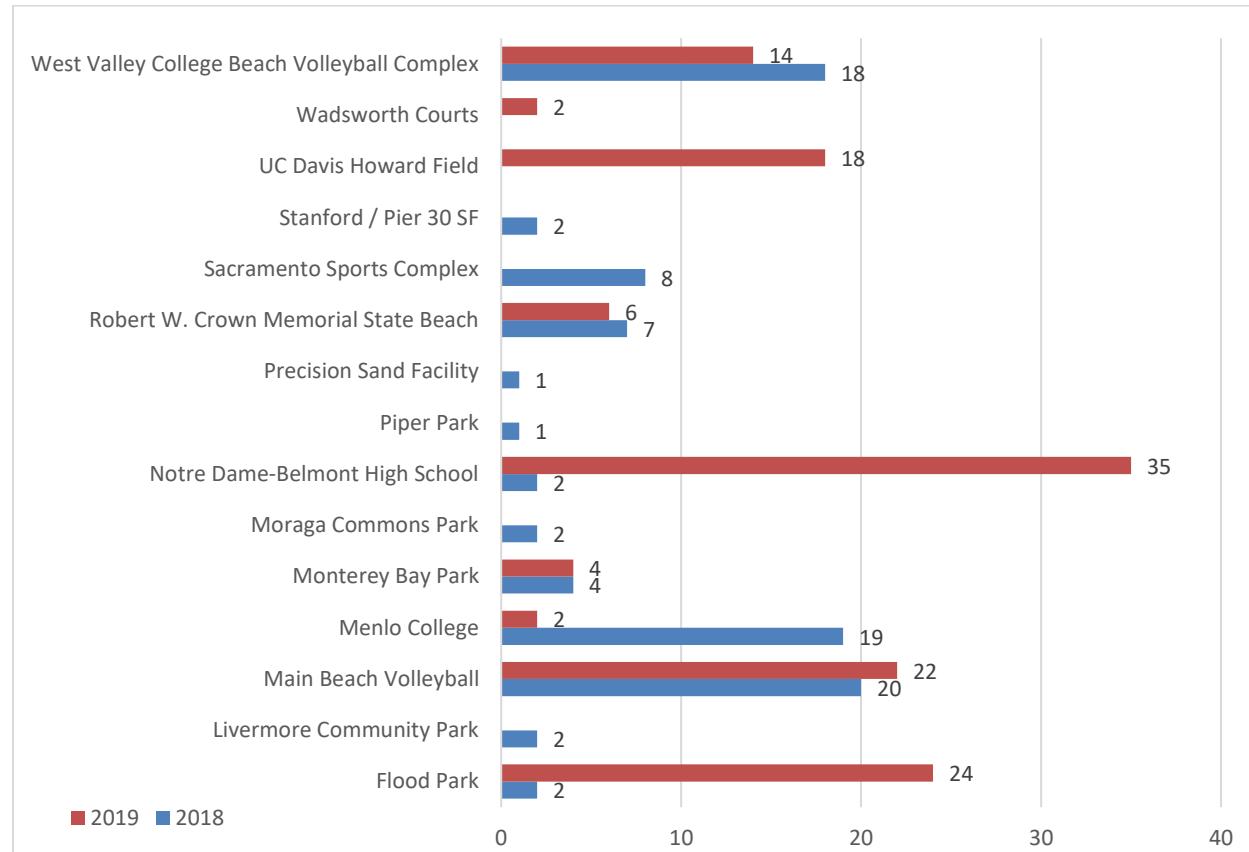
Figure 3. Juniors Beach Volleyball Tournament Events by Month and Year from 2018 to 2020



Source: Juniors Beach Volleyball Tournament website.

Figure 4 shows the Northern California Juniors Beach Volleyball tournaments by facility location. As the figure illustrates, there is a consistent increase in demand from 2018 to 2019, both in the number of tournaments and the number of facilities available to host tournaments. Data on the number of teams participating in each tournament are not available so we are unable to assess the true size of the market demand from these data.

Figure 4. Juniors Beach Volleyball Tournaments by Organizer from 2018 to 2020



Management Partners further researched each facility in Figure 4 to inform our analysis by identifying the number of courts at each location. Table 8 provides a summary of the data. The greatest number of courts is 16, located at the Santa Cruz Main Beach. Most facilities have between two and four courts.

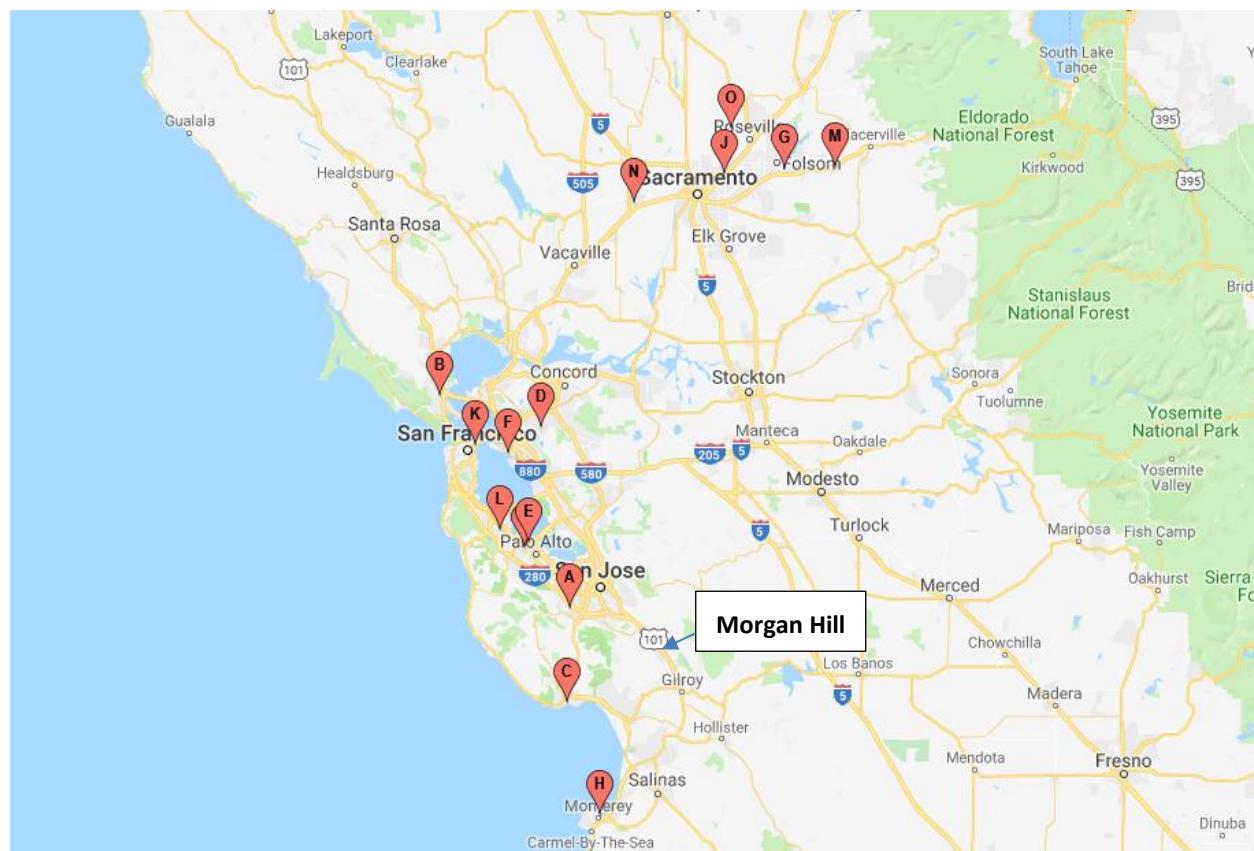
Table 8. Juniors Beach Volleyball Tournament Facility Locations and Number of Courts

Name of Facility	City	Number of Courts
A. West Valley College Beach Volleyball Complex	Saratoga	6
B. Piper Park	Larkspur	2
C. Main Beach Volleyball	Santa Cruz	16
D. Moraga Commons Park	Moraga	2

Name of Facility	City	Number of Courts
E. Flood Park	Menlo Park	2 (a third is planned)
F. Robert W. Crown Memorial State Beach	Alameda	6+ (BYO Net)
G. Livermore Community Park	Folsom	4
H. Monterey Bay Park	Monterey	5
I. Menlo College (concealed by E)	Atherton	4 (3 grouped, 1 across campus)
J. Sacramento Sports Complex	Sacramento	4
K. AVP San Francisco Open	San Francisco	Unknown, Temporary
L. Notre Dame-Belmont High School	Belmont	2
M. Precision Sand Facility	Shingle Springs	2
N. UC Davis Howard Field	Davis	3
O. Wadsworth Courts	Pismo Beach	8
P. Festerson Park (concealed by O)	Roseville	2
Average Number of Courts		4.6
Median Number of Courts		4
Most Frequent Number of Courts (Mode)		2

Management Partners mapped these locations to analyze their proximity to Morgan Hill to inform our analysis of the demand. Figure 5 shows the location of each facility as it relates to Morgan Hill, with most of the facilities located near Sacramento or closer to the Bay Area.

Figure 5. Juniors Beach Volleyball Tournament Locations Map



In addition to collecting data on the facilities hosting tournaments, Management Partners collected tournament activity by organizer. These groups are the clubs or training programs responsible for coordinating tournament events and may be potential partners for Morgan Hill if City leaders choose to pursue a sand volleyball complex. A list of organizers from the Northern California Volleyball website is provided below; and there may be other organizers not identified here.

- Sand Legs
- RedRock Beach
- Precision VB
- P1440
- NorCal High School League
- NCVA
- Moxie Beach
- Monterey Beach Open
- HS League
- Golden Gate VB
- CBVA
- Carioca VB
- Beach VB
- Bay to Bay
- Bay Area Beach League
- AVP First
- Academy Beach/P1440
- Academy

The Johnson report said, "There is a need for Sand Volleyball facilities throughout the country, as demand for large sand volleyball complexes far exceeds existing supply." Specifically, "There is demand for a sand volleyball complex from the following groups in California: USA Volleyball, AAU/Club programs, NCAA programs, Jr. College teams, Northern California Volleyball Association (NCVA), and California Beach Volleyball Association (CBVA)."

While some cities and counties have sand volleyball courts within parks, the inventory of tournament-level facilities (five or more courts) remains low. Most sand volleyball courts within parks are not built to tournament-level standards and typically there are fewer than four courts in a single facility. Additionally, there is no consistency in the ability to rent the facilities. Some jurisdictions monitor the rental of these recreational volleyball courts while others do not, making it difficult for regular practice times to occur.

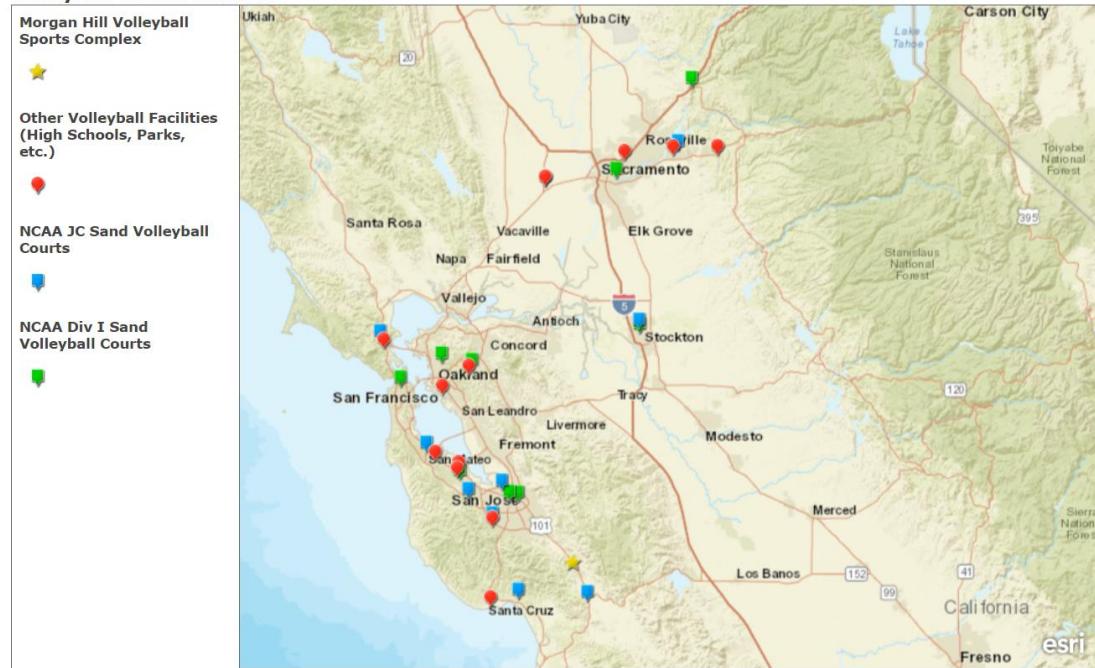
Table 9 includes the colleges with beach volleyball programs by type and county, showing that there is a high concentration of both junior college and Division 1 colleges with sand volleyball programs in Santa Clara County.

Table 9. Colleges with NCAA Beach Volleyball Programs in the Bay Area and Adjacent by County

Colleges by County	Junior College	NCAA I	Total
Alameda	0	1	1
Contra Costa	0	1	1
Marin	1	0	1
Sacramento	1	1	2
San Francisco	0	1	1
San Joaquin	1	1	2
San Mateo	1	0	1
Santa Clara	4	3	7
Santa Cruz	1	0	1
Yolo	0	1	1
GRAND TOTAL	9	9	18

Figure 6 shows a map of beach volleyball tournament locations in the Bay Area by tournament type. The red pins show the junior tournament locations and the blue and green markers show where the NCAA junior college and Division 1 tournaments are held.

Figure 6. Map of Beach Volleyball in Bay Area (Tournament Locations and NCAA/JC Colleges)

Volleyball Court Locations**Youth and Adult Play**

The growth of sand volleyball, especially at the youth level, can be directly related to recognition of sand volleyball by the NCAA in 2016 as a competitive sport. Yet there has been little growth in expanding facilities in beach communities. As a result of the action by the NCAA, colleges and universities are rapidly growing the sport and looking to construct facilities on their campuses. In California, this growth has been slower at the junior college level; however, growth of programs and facilities there is also increasing.

With scholarships available at the college and university level and the lack of recognition as a competitive sport by CIF at the high school level, private and public high school club sand volleyball teams are expanding rapidly in Northern California to fill the void of a feeder system for the growth at the university and college level. This increase appears to be outpacing the building of necessary facilities for practice, leagues, and tournaments and is leaving teams scrambling to find places to play.

Adult Recreational Play

Youth clubs and teams have established informal networks that can be used to further assess demand for tournaments and recreational play. However, estimating adult play is more difficult. There are numerous mediums utilized to organized free form adult games (meet up websites,

groups in social media, etc.). While some information is available through these websites to understand where and when groups play, it is not comprehensive and does not paint an accurate picture of the adult sand volleyball play demand.

In communities where the sand court is publicly owned, the local parks and recreation department can, space permitting, start adult sand volleyball leagues just as they might offer adult basketball or adult softball. However, as there is not a governing body to oversee local sand volleyball adult leagues, the only way to get participation numbers would be to contact each park and recreation department to see if they track participation. Therefore, estimating adult club play will need to be determined through subsequent information gathering by survey or other means from adult sports enthusiasts and related clubs.

Local Recreational Play

Currently there are no organized local sand volleyball leagues or tournaments in Morgan Hill, primarily as a result of the lack of existing facilities. As sand volleyball is not an activity that naturally occurs or is offered in most inland communities in California, should Morgan Hill construct a sand volleyball complex, leagues and tournaments should be expected to be developed over time.

With the growth at the youth level in California, Morgan Hill leaders should expect that youth teams will look to practice and possibly play tournaments early on in a limited fashion. It will take time to expand the use to include local residents/teams who are currently not organized in Morgan Hill.

Associated Attendance at a Destination Facility

Tournaments and leagues/practices that occur in California under the various sanctioning organizations range from 9 to 16 teams for youth, and as many as 80+ teams for adult tournaments. The typical competitive team is comprised of two players (although sand volleyball can be played with more than two players). Because the number of players (two) during competitive tournaments is so small, the overall impact of the number of players/spectators is relatively small.

When asked about how many spectators typically attend tournaments and practices, the most common factor used by the various sanctioning organizations is to factor 1.5 spectators per player. This means an 80-team tournament would conceivably bring a total of 400 players/ spectators.

As would be expected, more courts built, would result in larger tournaments, which would bring larger crowds to a destination location.

At the same time, the larger the facility, the more there will be an increased need for auxiliary facilities (restrooms, concession stand, storage, etc.) with additional construction costs. Trying to determine actual attendance at future tournaments is difficult. However, some information was obtained through a survey of prospective users.

Initial Demand and Focus

Management Partners and Morgan Hill staff have now created an in-depth list of individuals, coaches, players, supporters, organizations, and teams in northern California who are active in sand volleyball. The organizations on the list initially indicated some support, but there was no formal or even informal commitment to use a facility in Morgan Hill. Clearly, there was interest, but more research and networking needed to be done. Our general conclusions from the initial data gathering were:

1. We were unable to assess the potential for adult play at this point. Adult play peaks during the summer months, although there is play throughout the year and a facility in Morgan Hill may very well draw from the South Bay and beach communities. However, adult play cannot be projected based on current information.
2. Currently there is no local recreational play at the youth level and likely local adult play is minimal in Morgan Hill. Therefore, there is currently little draw for weekday play or practice and it is not something that can be adequately measured for a proposed project.
3. High school play is seasonal (February through May for leagues/tournaments and the rest of the year for year-round club teams), but initially Morgan Hill won't draw from local high schools as there are currently no high school club teams in the area.
4. Currently there are fewer youth level tournaments than adult level tournaments. An evaluation of youth tournament size, therefore, would be critical in sizing the facility (number of courts to result in the highest return on investment).
5. Morgan Hill is considering an "inland" sand volleyball complex which weather-wise, will be different than the sand volleyball that is played at beaches. In speaking with industry experts regarding the weather in Morgan Hill we found the following:
 - *Wind*: Afternoon/evening winds in Morgan Hill should not be an issue as most "beach" locations where sand volleyball is played are very windy.
 - *Heat*: With warm to hot summer daytime temperatures, the preference would be to provide lighted courts to take advantage of the nice evening temperatures in Morgan Hill.

Additionally, when tournaments are scheduled during hot weather, players can wear socks and use water to cool the sand between matches.

- *Rain:* Morgan Hill gets rain during the winter months which coincides with the time of year sand volleyball has the least use. With the proper sand installation and underground drainage, only excessive rain events would be a concern.

Sand Volleyball Survey

In March, Management Partners conducted a survey to assess interest in a potential destination facility under consideration by the City from sand volleyball teams and/or organizations. The survey was sent to 65 sand volleyball enthusiasts including 33 individual contacts and various representatives from seven different volleyball organizations. A total of 13 individuals responded and the results of the survey may be found in Attachment B.

While the survey was launched prior to the full onset of the COVID-19 pandemic, the escalation of the pandemic may have impacted survey response. Of those that responded:

- Nine respondents (69%) expressed interest in renting the facility for tournament use.
- Three (23%) indicated interest in practice and league use.
- One respondent (8%) was interested in renting the facility for camp use.
- Four respondents (31%) indicated they would anticipate overnight stays in Morgan Hill depending on whether tournament and league play lasts for two days or more.

Our major observations from the survey results indicate:

1. Competitive level volleyball is primarily found in two arenas: collegiate (growing since it became a sanctioned NCAA sport in 2016) and traditional beach volleyball (around from the 1960s); neither of which will be attracted to a regional destination facility for league or tournament play.
2. As the sport is relatively new but growing there will be increased interest in league play and camps, but it is not there yet to any large degree. League play and camps may have to be initially organized and lead by the City until interest increases.
3. As sand volleyball is likely to grow, the first public complex built in California will likely become a destination and well-positioned to take advantage of the growth.

4. There is interest in tournament play as several organizations (e.g., California Beach Volleyball Association and the Northern California Volleyball Association) are already offering tournaments in California. However, with few new facilities, there is currently little room to add tournaments to accommodate the growth in the sport. Opening a complex in Morgan Hill would not replace existing tournaments but would instead allow for expansion for the sport. Since the growth in sand volleyball is mostly at the youth level, it is expected that growth in tournament play in both the number of tournaments, and the number of teams in each tournament would be at the youth level.
5. Based on the initial research and the limited responses to Management Partners' survey, approximately 1.5 spectators per player will travel with a volleyball team *for tournament play*. This figure is not as high as other sports like soccer or baseball and the sand volleyball has fewer players per team.

As a result, the City should not expect that large numbers of spectators will attend tournaments in Morgan Hill until the sport has grown to include lower age groups where families attend; and large, regional tournaments can be scheduled that are multi-day events.

While large tournaments would bring recognition to Morgan Hill, sand volleyball tournaments will not necessarily make Morgan Hill a large destination site. Based on interest expressed in the survey, during the first year, the complex may have between 11,380 and 25,400 participants/spectators during tournament play. This would of course be based on the number of courts built.

The Initial Focus

Youth clubs and teams are looking for places to practice, play challenge matches against other clubs/teams, and create leagues and tournaments that can help develop the next level of athletes for the sport. This need will continue to grow as the program expands at the high school level. Eventually, the growth will move to the junior high level, but that is not expected until the high school level is sanctioned to play competitively.

Based on the initial survey, it does not appear that at this point high school level teams are interested in traveling distances to find space. Therefore, Morgan Hill's initial market for practices and leagues will be teams from the immediate surrounding area. Tournament play is more

promising based on the survey even though it will initially be limited to weekends and the months of March through June.

Although youth tournaments currently are not the size of adult tournaments, growth in the sport will lead to more youth tournaments being offered and more teams participating in each tournament. The capacity for youth tournaments now is not at the same level as adults, but it will build over time.

If determined to be operationally feasible, the initial focus should be on bringing tournaments to Morgan Hill as a destination. The interest expressed by respondents to the initial survey and the fact that the youth level is growing would indicate City leaders should consider phasing the complex over time. Currently youth tournaments attract between 9 and 16 teams. As these type of tournaments can include pool play (where all of the teams in a certain group play each other), ladder-type play (where teams play against each other working up a level of competition), elimination-type play (where winners and losers advance in respective divisions), or a combination of all three, a minimum of five to six courts is needed for youth tournaments to be successful at this time. When the youth division has grown and the adults start playing tournaments with the potential for 80+ team tournaments, the City will be in need of a much larger complex (as many as 21 courts to match national complexes at the highest level of play).

Although adult play will continue to grow as the sport grows at the youth level, based on the growth in the youth level in California, a complex in Morgan Hill would look to youth play capture. However, the City could make a concerted effort to jumpstart adult (and youth) growth locally by starting leagues, and holding exhibitions and tournaments as a parks and recreation-sponsored activity or through partnership with an experienced volleyball organization. This planned programming could be done either by City staff or through contracting for organizers to operate the league. Several interested organizations and teams have been identified in the survey that can help jumpstart activity at the complex should the project move forward.

Estimated Costs and Revenues

As part of this project, Management Partners examined cost impacts for the City to construct a facility along with a plan of service to operate such a facility. Based on the information gathered from facility operators and professionals working in the sand volleyball industry, we believe that operation of the sand volleyball facility could be provided by an outside, third-party operator.

Costs

The following section provides pricing information for both 4- to 6-court alternatives gathered by Management Partners and a 20-court alternative, provided by a consultant hired by the City of Morgan Hill.

Four to Six Court Alternatives

As part of our examination of the cost impact to construct a sand volleyball facility, we examined both four-court and six-court alternatives. The facilities below were all built for tournament or collegiate play. The costs per court are estimated to be between \$274,282 and \$552,000, based on information provided by the three facilities below.

- **Stanford University Sand Volleyball Facility.** This facility is a four-court, NCAA tournament-level facility. Management Partners worked directly with the general contractor who constructed this facility to obtain updated estimates on the cost to construct a similar facility on the Morgan Hill site. The two quotes represent a basic level facility (with minimal aesthetic upgrades) and an enhanced facility, comparable to the Stanford complex.
- **Cal Poly San Luis Obispo.** As part of our outreach, we obtained the total cost of the five courts currently under construction at Cal Poly San Luis Obispo. These courts represent a more “basic” facility (with minimal aesthetic upgrades).
- **Huntsville, Alabama.** In our efforts to find a complex with a larger number of courts that could accommodate larger tournaments, we identified a site with 12 courts in Huntsville, Alabama, and obtained construction costs for that complex. These costs, however, may not be representative of the costs in Morgan

Hill (or California) due to the lower construction costs in the Huntsville area and the economies of scale that can be achieved when constructing a greater number of courts.

Table 10 shows the estimated costs per court. These estimates do not reflect soft costs, such as permit fees, architectural fees, etc. which could be estimated at 15% to 20% of construction costs.

Table 10. Cost Projections

	Stanford University (Basic)	Stanford University (Enhanced)	Cal Poly/ San Luis Obispo	Huntsville, Alabama
Construction Cost per Court	\$228,568	\$430,893	~\$460,000	~\$308,333
Soft Costs (20%)	\$274,282	\$517,072	\$552,000	\$370,000
Total Cost (four courts)	\$1,097,128	\$2,068,288	\$2,208,000	\$1,480,000
Total Cost (six courts)	\$1,645,692	\$3,102,432	\$3,312,000	\$2,200,000

The Johnson Report stated, “Sand volleyball facilities do not require a large investment, typically \$10,000 to \$15,000 per court and also have very low maintenance costs.” The Johnson Report does not, however, specify where or how they arrived at this estimate (it may be a nationally based figure), nor does it specify the quality or level of construction. Based on information we have obtained their estimate may be more in line with sand volleyball courts constructed at parks for local recreational use rather than for a destination facility. Neither the cities of Walnut Creek nor Moraga were able to provide substantive construction costs estimates. Additionally, their court play is for recreational use, rather than destination or tournament-level facilities.

Costs will absolutely vary depending on the objective of the facility and the level of play intended. The City of Morgan Hill may build an initial set of courts that could indeed cost less, as a first phase. Courts built only for recreational play in a city park will certainly cost less.

Twenty Court Alternative

In addition to the initial research done by Management Partners, the City of Morgan Hill worked with Verde Design, Inc. to obtain pricing estimates (including design and construction costs) for 20 courts to be constructed in five phases. The estimated pricing for all 20 courts is around \$14 million, to be completed in phases. The initial phase would cost approximately \$2 million. These estimates include design, bidding, and construction contingency.

The cost for court construction includes site preparation and demolition, grading, court and curb construction, paving, site furnishings (e.g., drinking fountains, water lines, nets and posts, shade stands), fence and gates, planting and irrigation, and electrical. Unlike the previous cost estimates, these include the cost for sport court lights.

Maintenance Costs

In our information gathering interviews we were unable to obtain any real estimate for maintenance costs for sand volleyball courts. The Santa Cruz court maintenance costs are part of the overall Wharf and Beach Maintenance Division and they do not separate out costs for the sand volleyball courts.

In discussions with other cities that have one or two sand volleyball courts in a public park, staff informed us that the maintenance costs are fairly minimal and are not tracked separately from routine park maintenance. Huntsville, Alabama, was unable to provide maintenance costs for their tournament-level complex since it was under renovation and it only recently opened.

Experience suggests that when recreational courts are a part of a larger use facility (a recreational court in a public park or on a beach) agencies do not track maintenance costs. However, a multi-court facility in a regional sports complex would be expected to have regular scheduled maintenance and paid for as a part of the master fee schedule established for the complex.

Revenues

The following provides some basic revenue information for local recreational play based on Management Partners' initial research about local facilities as well as some additional revenue estimates based on the survey.

Local Recreational Play

Since a tournament-level sand volleyball facility focused on youth has not yet been constructed in the Bay Area, it is difficult to estimate the projected revenues that can be expected. (We were unable to obtain any revenue information from either Santa Cruz or the City of Huntsville). To obtain rough estimates on projected revenue, Management Partners reached out to several municipalities that rent their sand volleyball courts at municipal parks to determine rough revenue projections. The information therefore is based on local recreational play.

The cities of Walnut Creek and Moraga provided historical revenue estimates. While Walnut Creek does not host tournament-level play, they do let club teams from UC Berkeley practice on their court at a corporate rate. Moraga hosts some junior tournaments on their courts. A summary of the historical revenue for each is provided in Table 11.

Table 11. Historical Revenue (per court) for Sand Volleyball Courts in Walnut Creek and Moraga

City	Number of Courts	FY 2016-17	FY 2017-18	FY 2018-19
Walnut Creek	4	<i>Not available</i>	\$2,861	\$5,836
Moraga	2	\$6,500	\$4,000	\$5,500

Walnut Creek experienced a 204% increase in revenues from FY 2017-18 to FY 2018-19 due to a change in how fees are administered. They shifted from online booking to requiring reservations be made on the phone. They also always keep one court open, not available to reserve, to allow for drop-in play.

The City of Walnut Creek estimates that 80% of its rental revenue comes from weekday play, local school teams during the year, and summer camps. The 20% of weekend revenue is generated from picnics or pick-up play. Walnut Creek staff noted that to generate strong weekday use requires a local community with sufficient activity and interest (multiple schools with teams and/or camps). Clearly, Walnut Creek can draw from a more dense, urban population than Morgan Hill which is located in a more rural, less densely populated area of Santa Clara County.

Walnut Creek charges \$30 per hour with a one-hour minimum and four-hours maximum. Currently most of the reservations are from youth groups, high school groups, and the UC Berkeley teams. There has been community interest in adding lighted courts and there are plans to do so at a new park facility in the next five to ten years.

Moraga experienced its greatest revenue on a per court basis in FY 2016-17, the first year after they renovated their sand courts. Moraga charges \$25 per hour for nonprofit organizations, \$35 per hour for residents, and \$45 per hour for commercial use (which includes tournaments). All rental rates include use of both courts. Approximately 80% of reservations are from junior play. The City has an MOU with St. Mary's College to use the courts at no charge. There has not been sufficient community interest to justify construction of additional courts or lighted courts.

Based on this information only, Morgan Hill could expect to generate between \$21,333 to \$32,000 at an average annual rental revenue of \$5,333 per court. This estimate represents mostly recreational or practice play

and may be somewhat conservative due to the quality of courts in Walnut Creek and Moraga and the lack of tournament play. Although Moraga hosts some tournaments, the small number of courts limits the amount of tournament play. Therefore, our revenue estimates are representative of recreational play only. Further analysis would need to be done to estimate projected tournament revenue. A summary of the range of projected revenue (based on existing revenue data), is provided below in Table 12.

Table 12. Projected Revenue for Local Recreational Play

Court Configuration	Low (\$2,861 per court)	Average (\$5,333 per court)	High (\$6,500 per court)
4 courts	\$11,444	\$21,332	\$26,000
5 courts	\$14,305	\$26,665	\$32,500
6 courts	\$17,166	\$31,998	\$39,000

Potential League, Practice, and Camp Play and Tournaments

The following revenue estimates were generated from the results of our initial research and the survey of potential users. We found generally that court rates vary depending on the facility. A summary of the court rates from various facilities and the survey response is provided in Table 13.

Table 13. Court Rates Gathered from Sand Volleyball Facilities and Survey Respondents

Sources	Court Rates
Santa Cruz	\$38 per court, half-day
	\$72 per court, full day
West Valley College	\$20 per hour, three hours minimum
Survey Responses	\$25 per hour, per court
	\$20 per hour, per court

In trying to determine a court rate that would be “within the local market” we used a rate of \$20 per hour per court. If the City moves forward with the complex, it would be advisable to meet with prospective user groups to finetune the fees to include full- and half-day rentals, weekend rentals, and separate categories for non-profit and for-profit organizations that would match most large complexes.

Including the court rates, we developed five assumptions to help project expected revenue the City of Morgan Hill would potentially generate if they build 6, 12, or 20 courts from input on the survey. The five assumptions are shown in Table 14.

Table 14. List of Assumptions

Assumptions	Description
Assumption 1	\$20 per hour, per court
Assumption 2¹	Projected use of the facility based on survey responses.
Assumption 3	For requested uses that ask for more courts than available, the assumption is that they would only be able to use the courts available and that the hours of use and/or days of use were not increased.
Assumption 4	For any request that indicated the hours of use per day was eight hours or more, the assumption for the calculation was eight hours of use.
Assumption 5	For league play, if courts were requested but did not indicate the number of hours per month, eight hours per month were used.

¹Specific dates of use as indicated in the survey were disregarded. It is likely the City would be able to accommodate all use by adjusting within the month indicated.

Using these assumptions, we applied them to the survey results based on respondents who had provided their interest in renting the facility for tournament use, practice play, league play, and camp play. Respondents who had expressed interest were asked to provide the number of courts, number of hours per day, and number of days per week or month they would like to rent the courts.

From the data the respondents provided, we projected the expected revenue that could potentially be generated from 6, 12, or 20 courts. Based on these projections, we found that tournament play would generate the most revenue for the City. A summary of the projections is shown in Table 15.

Table 15. Potential Expected Revenue Based on Survey Results

Type of Use	6 Courts	12 Courts	20 Courts
Tournament	1,138 court hours \$20/hour = \$22,760	1,876 court hours \$20/hour = \$37,520	2,540 court hours \$20/hour = \$50,800
Practice Play	486 court hours \$20/hour = \$9,720	486 court hours \$20/hour = \$9,720	486 court hours \$20/hour = \$9,720
League Play¹	480 court hours \$20/hour = \$9,600	720 court hours \$20/hour = \$14,400	720 court hours \$20/hour = \$14,400
Camp Play²	360 court hours \$20/hour = \$7,200	360 court hours \$20/hour = \$7,200	360 court hours \$20/hour = \$7,200
TOTAL EXPECTED REVENUE	\$49,280	\$68,840	\$82,120

¹No requests were for more than 12 courts.

²No request were for more than 6 courts.

Table 15 only provides an estimate of the revenue that the City could expect based on the use indicated in the survey. It is also only for sand volleyball use and does not consider other uses that might take in the space. This “snapshot in time” could be higher or lower based on when the complex is built, the number of courts, and the time the City (or contracted operator) spends marketing the complex. The number would also be expected to increase if the City decided to directly get involved in offering leagues, camps, practices, and tournaments which, in many cities, is a common park and recreation department function.

Potential Players/Spectators

Based on the hours of use in Table 15 and using a compounding figure of 1.5 spectators per player, the expected players and spectators combined would be shown in Table 16.

Table 16. Potential Players/Spectators Per Year

Type of Use	6 Court	12 Courts	20 Courts
Tournament	11,380	18,760	24,400
Practice	4,860	4,860	4,860
League	4,800	7,200	7,200
Camp	3,600	3,600	3,600
TOTAL	24,640	34,420	41,060

As with the expected revenue numbers in Table 16, the number of players and spectators could be higher or lower based on actual usage and to the extent the City is involved in marketing/offering programs at the complex.

A Strategy for Moving Forward

The information that Management Partners has been able to gather clearly indicates that the sport of sand volleyball is growing. The collegiate sport will take care of itself, meaning that colleges and universities will construct courts, provide scholarships and competitive play as their students or prospective students move into the sport. In addition to sand volleyball, there is growing interest across the country for use of sand areas for sand soccer, sand tennis, and for cross-fit training. Though these additional uses by themselves likely do not add enough additional use for Morgan Hill to move forward with construction of sand courts, they do show the diversity that an athletic sand area can accommodate.

The question then before Morgan Hill remains to what extent will youth sand volleyball tournaments, practice, or recreational play (youth and adult) generally be willing to travel to Morgan Hill. While adult tournament play is fairly static, it is mostly because there are so few sand volleyball complexes or sites available. The minimum number of courts necessary to hold a traditional sand volleyball tournament is five, and other than Santa Cruz, there is no public (non-school related) sand volleyball complex in Northern California.

Based on the organizations contacted and the extensive list of coaches, clubs, and individuals the City has collected, there appears to be interest from volleyball enthusiasts; however, at the current time interest seems to be around tournament play. There also seems to be a lack of interest for teams to travel very far other than for tournament play. This leaves Morgan Hill having to rely on locally based teams and players for league, camp, and practice use.

An Efficient and Sustainable Master Site Plan and Complex

In speaking with sand volleyball complex planners, construction companies, and operators, several points were consistently stressed related to the efficient and appropriate design of a sand volleyball complex. These are discussed below.

- Design the complex from the beginning with the end goal in mind. It is important to understand ultimately what is intended at build out. This is especially important if a complex needs to be phased, to avoid redoing facilities or courts that were lacking when the finish line wasn't fully understood in the beginning.
- To the extent financially possible, invest in related equipment and support facilities as part of any early phase. Tournaments can have an economic impact on the community; however, tournaments that create a fun and positive experience are scheduled at complexes with some support and amenities more often than those that have portable restrooms or lack adequate support facilities.
- Invest in lighting infrastructure to support lighting in the future. Though it is considered a high-end component, very few complexes utilize lights for night play. Considering Morgan Hill has favorable weather for most of the year and is relatively hot during the summer months, the ability to play into the evenings under the lights would be a big plus.
- Develop a master plan for the site. There should be a consensus regarding what the complex will be and the steps necessary to get there.
- Identify prospective users of the complex and invite them to serve as a focus group for the master plan design. Their insight generally as well as comments that might be specific to the local area will be important to surface early so the master plan truly meets the needs of the local sand volleyball community.
- Identify prospective operators prior to a master plan process. If the City is considering contracting for operation and maintenance of the complex, they should be contacted to incorporate feedback about what is necessary to operate a sand volleyball complex.

An Initial Strategy

A complex with a minimum of six courts (five for play and one for warm up) in Morgan Hill may indeed put Morgan Hill on the map as a place to accommodate continuous sand volleyball, particularly at the youth level and perhaps for training and recreational play. However, as indicated by the survey, at the current time, the interest is in weekend tournament play.

Clearly, there are data that indicate growth at the youth level looking for courts to practice and play on during the week, with tournament play on weekends. At this time, however, it is difficult to assess how much practice or recreational play might ensue (due to Morgan Hill's geographic location). The survey provides some insight into how many

tournaments might be willing to travel to Morgan Hill. However, the information is limited to those who responded at the start of the significant uncertainty resulting from the COVID-19 pandemic.

City leaders have indicated that while they have land and may have capital funds to construct sand volleyball courts in the future, an initial analysis by City staff indicates it may not be financially feasible from an operational perspective. Management Partners well understands that the City is not able to commit to build something that would cost funds to either supervise or operate; at least certainly not in the long-term and without comprehensive and sound revenue projections that would support the City's ongoing commitment to cost recovery in its recreational programs. Gaining this assurance will require gathering additional, detailed information through a series of action steps. These are likely to be led by staff, potentially with assistance from a sand volleyball complex third-party operator. Management Partners recommends the following:

Recommendation 1. Complete the concept design and cost estimates for a sand volleyball complex of up to 20 courts. Verde Design is currently under contract to provide a concept design with cost estimates for a 20-court facility. The City should include the amenities indicated in the survey.

Recommendation 2. Following completion of the design, organize focus groups *from the sport of sand volleyball (coaches, clubs, and tournament sponsors)* to determine the level of potential recreational and tournament play that might be expected at a facility and to provide feedback on the master plan design.

Recommendation 3. Invite potential operational and construction partners to come to Morgan Hill for further consultation regarding design, construction and operations.

Recommendation 4. If there is interest from an operational partner, move forward with construction of a Phase 1 facility (up to six courts). This should occur following implementation of Recommendations 1 through 3.

If the City moves forward with Phase I design and construction, other uses that could take place at a sand volleyball facility (e.g., cross-fit

exercise, sand soccer, etc.) as sand volleyball ramps up should be considered during the design phase.

At this point, it is going to take further cost/benefit analysis and policy determinations from the City to move the complex forward in Phase 1. We believe the growth in the sport will develop over time and the first, full-use complex built inland in California will benefit from the first wave of use and be positioned to be the destination spot for the growing sport.

Conclusion

Our analysis indicates that sand volleyball is a growing sport and there are strong supporters of and interest in the sport. Sand volleyball enthusiasts are eager for the sport to expand, which at the current time is primarily at the collegiate and NCAA level, although high school play has expanded in recent years. Nonetheless, for these levels to be successful, sand volleyball must inevitably draw from and attract youth play. Although youth play is not yet to the level of adults, it is growing at a rapid pace and is expected to follow other sports where there are more youth playing the sport than adults.

If California follows other states by certifying sand volleyball as a competitive sport through the California Interscholastic Federation (CIF), interest will expand even further. There appears to be serious interest in tournament play and there is a lack of facilities in the Bay Area for this to occur, except at college locations. Morgan Hill has been a proven leader in the region, capable of attracting sports teams to a regional destination for play. An initial six-court facility may be the best gage of the potential to assess whether sand volleyball can also become a destination facility in Morgan Hill.

Attachment A – List of Recommendations

Recommendation 1. Complete the concept design and cost estimates for a sand volleyball complex of up to 20 courts.

Recommendation 2. Following completion of the design, organize focus groups *from the sport* of sand volleyball (coaches, clubs, and tournament sponsors) to determine the level of potential recreational and tournament play that might be expected at a facility and to provide feedback on the master plan design.

Recommendation 3. Invite potential operational and construction partners to come to Morgan Hill for further consultation regarding design, construction and operations.

Recommendation 4. If there is interest from an operational partner, move forward with construction of a Phase 1 facility (up to six courts).

Attachment B – Sand Volleyball Survey Results

As part of the City of Morgan Hill's process to consider the development of a sand volleyball destination facility, Management Partners designed and administered a survey to assess interest from teams and/or organizations who would pay to reserve courts at the facility. The survey was sent to 65 sand volleyball enthusiasts including 33 individual contacts and various representatives from seven different volleyball organizations. It was open from March 2 through April 1, 2020. A total of 13 representatives from the sand volleyball community responded, although not all 13 answered all the questions. Also, while the survey was launched prior to the full onset of the COVID-19 pandemic, the escalation of the pandemic may have impacted survey response.

The survey provided a list of assumptions for respondents to consider. The assumptions are described below.

A first phase facility would:

- *Be available for play January 1, 2021*
- *Feature the following amenities:*
 - *Twenty high-quality courts*
 - *Center court with bleachers*
 - *Parking*
 - *Permanent restrooms*
- *Have no lights*
- *Be located in Morgan Hill, approximately 30 miles south of the San Jose International Airport, which is about a 30-minute to 1-hour drive from the airport.*

Some of the major highlights from the survey results indicate that nine of the respondents (69%) expressed interest in renting the facility for tournament use, but only three (23%) indicated interest in practice and league use. Only one respondent (8%) was interested in renting the facility for camp use. Moreover, four respondents (31%) indicated they would anticipate overnight stays in Morgan Hill depending on whether tournament and league play lasts for two days or more. Survey responses are summarized in the tables and figures below.

Section 1. Respondents' Information

Management Partners asked a series of questions to understand some details who participated in the survey. Table 17 provides a summary of the survey respondents.

Table 17. *Respondent Information*

Organization/ Team	Sanctioning Body	Number of Teams Represented	Number of Potential Players Represented	Age Range of Players Represented	Gender of Teams/ Players Represented	Where Team/ Players Practice	Destinations for Tournament Plays
Northern California Volleyball Association (NCVA)	USA Volleyball (USAV)	1,400	16,800	Adults (18) and Juniors (10)	All genders	N/A	Any place in Northern California
California Beach Volleyball Association (CBVA)	California Beach Volleyball Association (CBVA)	100s	100s	Junior to adult	All genders	We host events at the courts at Main Street Beach in Santa Cruz	N/A
NorCal High School Beach Volleyball	Amateur Athletic Union (AAU)	Roughly 30 schools in the NorCal area	180	14 to 18	Female	Notre Dame Belmont, Westford Valley College, Marin College, Santa Cruz Main Beach	Notre Dame Belmont, Westford Valley College, Marin College, Santa Cruz Main Beach
Beach Volleyball	AVP, AAU, P1440	100	250	10 to 18 (all juniors)	90% girls	I don't have practice. I am only a tournament promoter/director.	Leases the 16-court facility at Santa Cruz, 6 courts at West Valley and 4 courts at Notre Dame Belmont
University of San Francisco	NCAA Division I Beach and Indoor Volleyball	1 collegiate beach team	15	18 to 23	Women	Ocean Beach, San Francisco, College of Marin	Main Beach at Santa Cruz and a variety of college campuses with sand court facilities
American Volleyball Coaches Association	N/A	166 college varsity programs	N/A	18 to 22	Women	College campuses	AVCA hosts the Small College Beach Championships in Tavares, FL https://www.avca.org/events/small-college-beach-champ.html

Organization/ Team	Sanctioning Body	Number of Teams Represented	Number of Potential Players Represented	Age Range of Players Represented	Gender of Teams/ Players Represented	Where Team/ Players Practice	Destinations for Tournament Plays
Rush Volleyball Club	N/A	20	40	11 to 18	All genders	Gavilan College	Santa Cruz
Bay to Bay Volleyball	N/A	4	200	12 to 18	All genders	West Valley College	Hermosa Beach, Santa Cruz, Phoenix, Austin, Huntington Beach, Manhattan Beach
Morgan Hill Volleyball Club	N/A	16	200	8 to 18	All genders	Crossroads Christian Center	Santa Cruz
Platform 1440	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Association of Volleyball Professionals (AVP)	AVP	N/A	N/A	N/A	N/A	N/A	N/A
Redrock Beach East Bay	N/A	30	60	12 to 18	Female	Crown Beach, Alameda	Monterey, Santa Cruz, West Valley College
USA Volleyball (USAV)	National Governing Body	N/A	N/A	10 to 18	All genders	N/A	N/A

¹Respondent only responded to questions one through five of the survey.

²Respondent only responded to question one of the survey

Section 2. Survey Questions

Figure 7 shows responses to the question pertaining to the respondents' **interest in renting volleyball courts in Morgan Hill**. All 13 survey participants responded to the question. Of the 13, 10 (77%) indicated they would be interested in renting volleyball courts in Morgan Hill.

Figure 7. Would you or your organization be interested in renting volleyball court(s) in Morgan Hill based on the assumptions specified above?

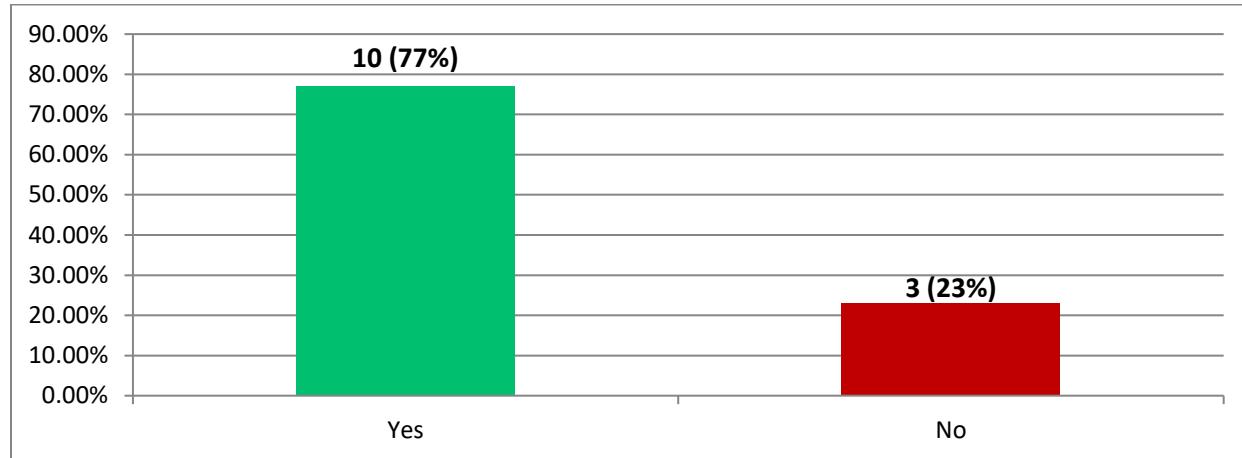


Figure 8 is a **follow-up question** to the three respondents who indicated they are not interested in renting volleyball courts in Morgan Hill. The respondents were asked if there are any other amenities needed for them to rent the facility. All three respondents indicated no, with no additional comments.

Figure 8. Are there any amenities missing from phase one (based on the assumptions specified) that would need to be added for you to use the facility?

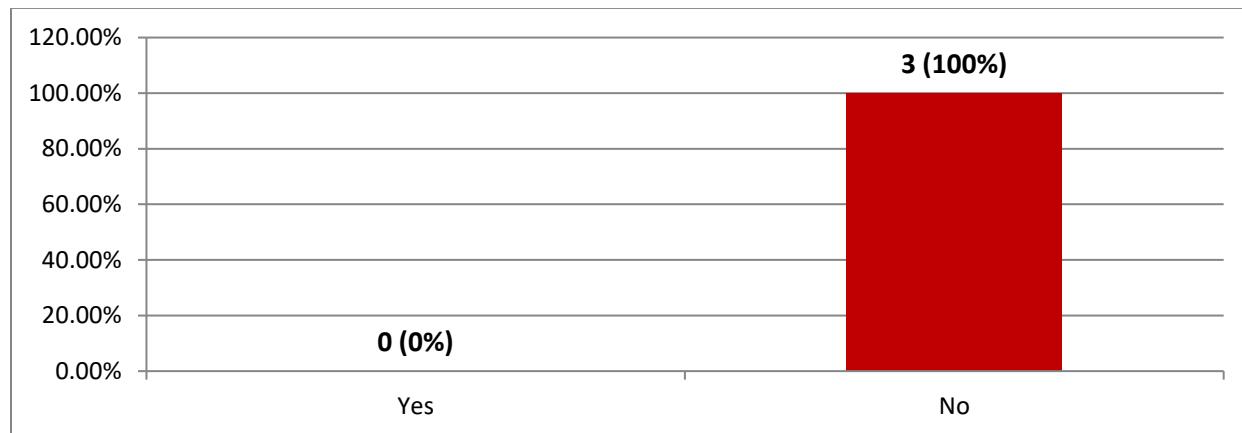


Figure 9 shows responses to the question pertaining to **volleyball tournaments**. Twelve individuals responded to the question. Of those, nine (75%) indicated they are interested in renting the facility for tournaments.

Figure 9. Would your organization be interested in renting space for tournaments?

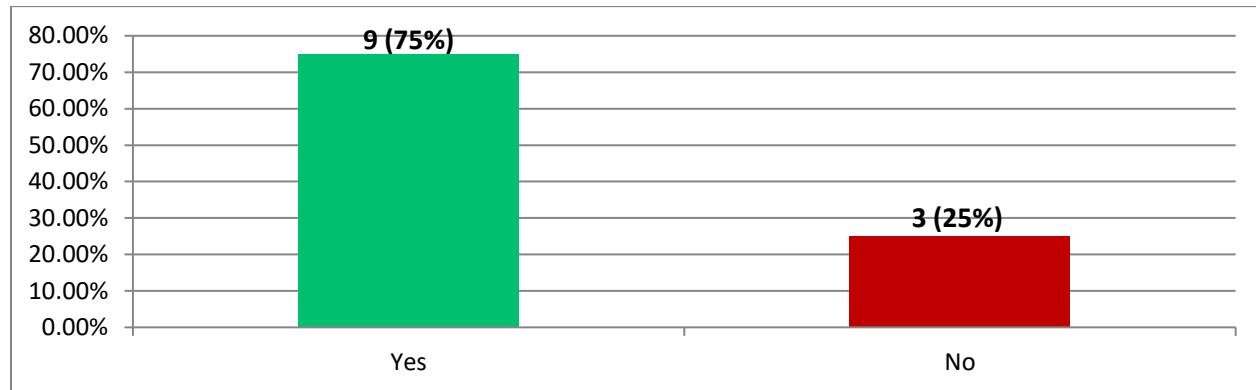


Table 18 is a **follow-up** to the nine respondents who **expressed interest in renting the facility for tournaments**. Respondents were asked to list the tournaments they would potentially host if the facility was to open in 2021. Based on the responses, the greatest interest was expressed in hosting tournaments in March, followed by April, May, and June.

Table 18. *Follow-up responses from respondents interested in hosting tournaments.*

Name	Tournament	Start Date	Number of Tournament Days	Number of Courts	Number of Hours Per Day	Gender	Age Division	Comments
Alex Jones	Tournament #1	June 5	1	6	6	Male	Youth	N/A
Barry Peters	Tournament #1	March 13	1	4	5	Female	Youth	This would be a great facility for our league to use; many high schools in the area could utilize these for practices, beyond the tournaments listed.
	Tournament #2	April 11	1	4	5	Female	Youth	
	Tournament #3	May 3	1	20+	8+	Female	Youth	
Brian Calimpong	Tournament #1	March 15	1	6	8+	Both	Youth	N/A
	Tournament #2	April 15	1	6	8+	Both	Youth	
	Tournament #3	June 16	1	6	8+	Both	Youth	
	Tournament #4	July 17	1	6	8+	Both	Youth	
	Tournament #5	August 20	1	6	8+	Both	Youth	
Donna Donaghy	Tournament #1	March 14	2	16	8+	Both	Both	N/A
	Tournament #2	April 11	2	16	8+	Both	Both	
	Tournament #3	May 23	2	16	8+	Both	Both	
	Tournament #4	June 20	2	16	8+	Both	Both	
	Tournament #5	July 25	2	16	8+	Both	Both	
Frank Lavrisha	Tournament #1	March 7	2	6	7	Female	Adult	Your facility could be an alternative to Main Beach in Santa Cruz. The number of courts would allow for a unique event that would bring many collegiate teams to one location.

Name	Tournament	Start Date	Number of Tournament Days	Number of Courts	Number of Hours Per Day	Gender	Age Division	Comments
Fernando Sabla	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Dates are to be determined and not confirmed for potential junior tournaments
Mark Hull	N/A	N/A	N/A	N/A	N/A	N/A	N/A	At this time, I would need to know the cost of renting courts and all the required insurance, deposits, and fees that would be required before I can make any commitment.
Martin Suan	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Todd Sears	Tournament #1	March 10	1	20+	7	Both	Youth	I don't have a club. I only run large tournaments. I would lease the facility for my events.
	Tournament #2	April 10	2	20+	7	Both	Youth	
	Tournament #3	May 10	1	20+	7	Both	Youth	
	Tournament #4	June 10	N/A	20+	7	Both	Youth	

Figure 10 shows responses to the question pertaining to **practice plays**. Eleven people responded to the question. Of the 11, a total of 4 respondents (37%) indicated they would be interested in renting the facility for practice play.

Figure 10. *Would you or your organization be interested in renting space for practice play?*

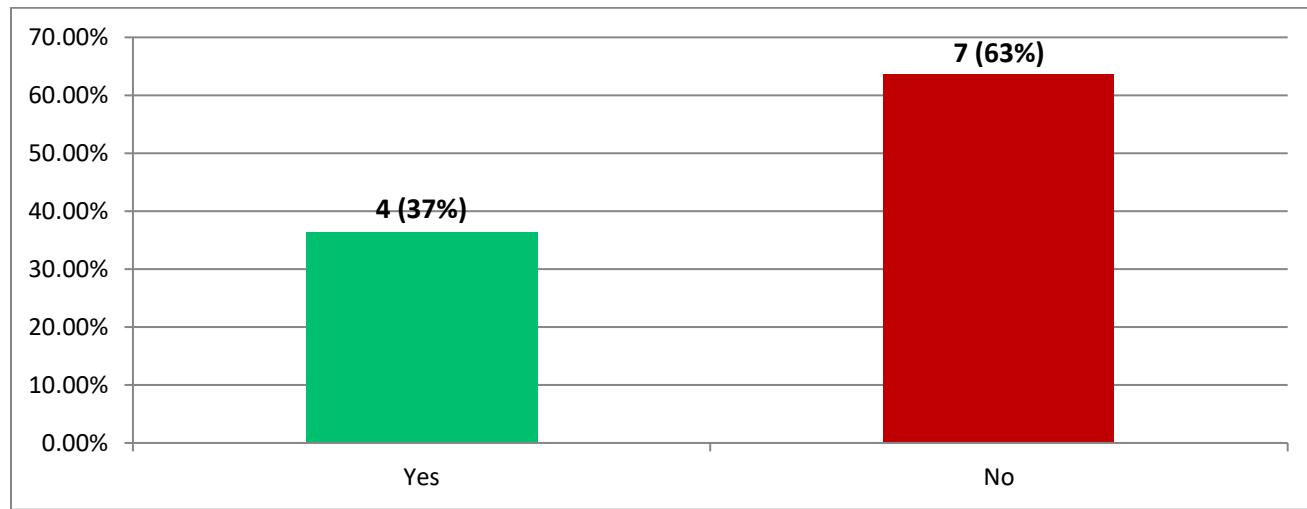


Table 19 is a follow-up to the four respondents who **expressed interest in renting the facility for practice play**. Respondents were asked to list the practice play they would potentially host if the facility was to open in 2021. Of the four respondents, only one was able to identify when they would use the facility, indicating the use for female youth practice during the weekdays and weekends from March through August.

Table 19. *Follow-up response from respondents interested in hosting practice plays.*

Name	Type of Practice	Month	Weekday Daytime Hours	Weekday Even Hours	Weekend Hours	Number of Courts	Primary User	Comments
Barry Peters	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Brian Calimpong	Youth Practice 1	March	12	15	N/A	3	Female	N/A
	Youth Practice 2	April	12	15	N/A	3	Female	
	Youth Practice 3	May	12	15	N/A	3	Female	
	Youth Practice 4	June	12	15	N/A	3	Female	
	Youth Practice 5	July	12	15	N/A	3	Female	
	Youth Practice 6	August	12	15	N/A	3	Female	
Fernando Sabla	NA	N/A	N/A	N/A	N/A	N/A	N/A	To be determined
Shannon Oberg	Youth Practice 1	June	N/A	N/A	N/A	N/A	N/A	N/A

Figure 11 shows the responses to the question pertaining to **league play**. Eleven individuals responded to the question. Of the 11, 3 respondents (28%) indicated they would be interested in renting the facility for league play.

Figure 11. *Would you or your organization be interested in renting space for league play?*

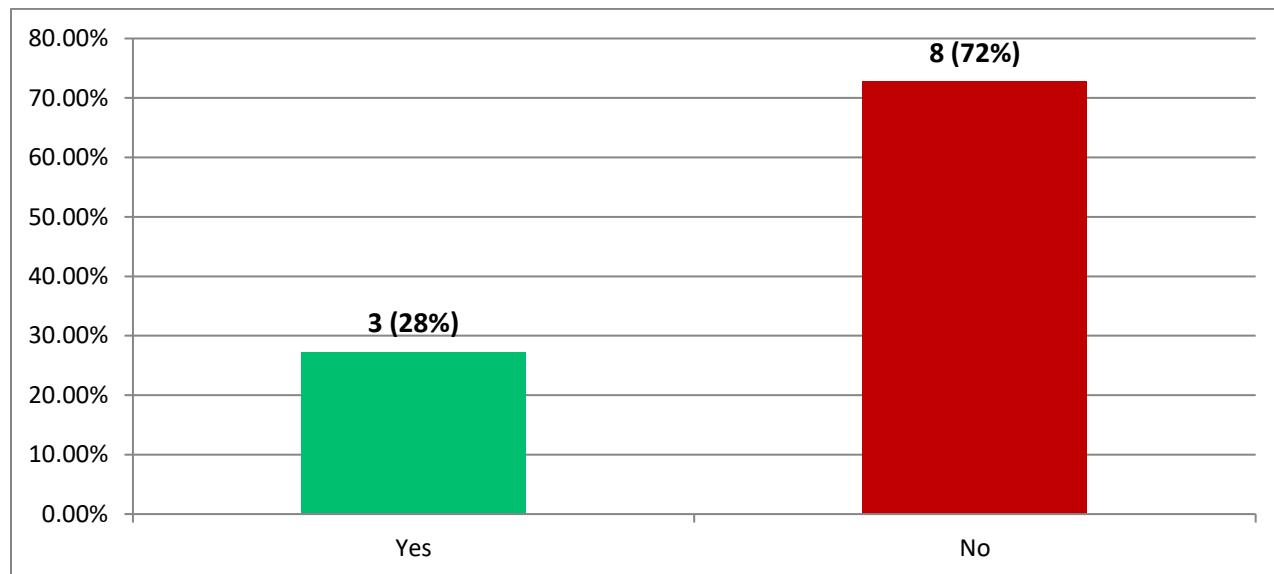


Table 20 is a follow-up to the three respondents who **expressed interest in renting the facility for league play**. Respondents were asked to list the league play they would potentially host if the facility was to open in 2021. Of the three respondents, two indicated they would be interested in hosting league play for both males and females in the youth and adult divisions from April through August.

Table 20. *Follow-up responses from respondents who are interested in hosting league play.*

Name	Tournament	Month	Weekend/ Weekday	Day/Evening	Number of Court(s)	Number of Hours Per Month	Gender	Age Division
Donna Donaghy	League Play #1	April	Both	Both	12	N/A	Both	Both
	League Play #2	May	Both	Both	12	N/A	Both	Both
	League Play #3	June	Both	Both	12	N/A	Both	Both
	League Play #4	July	Both	Both	12	N/A	Both	Both
	League Play #5	August	Both	Both	12	N/A	Both	Both
Brian Calimpong	League Play #1	April	Weekend	Daytime	6	8	Both	Both
	League Play #2	May	Weekend	Daytime	6	8	Both	Both
	League Play #3	June	Weekend	Daytime	6	8	Both	Both
	League Play #4	July	Weekend	Daytime	6	8	Both	Both
	League Play #5	August	Weekend	Daytime	6	8	Both	Both
Gary Hodge	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A

Figure 12 shows responses to the question pertaining to **camp play**. Three of 12 individuals responded to the question. Of the three, one respondent (33%) indicated they would be interested in renting the facility for camp play.

Figure 12. *Would you or your organization be interested in renting space for camp play?*

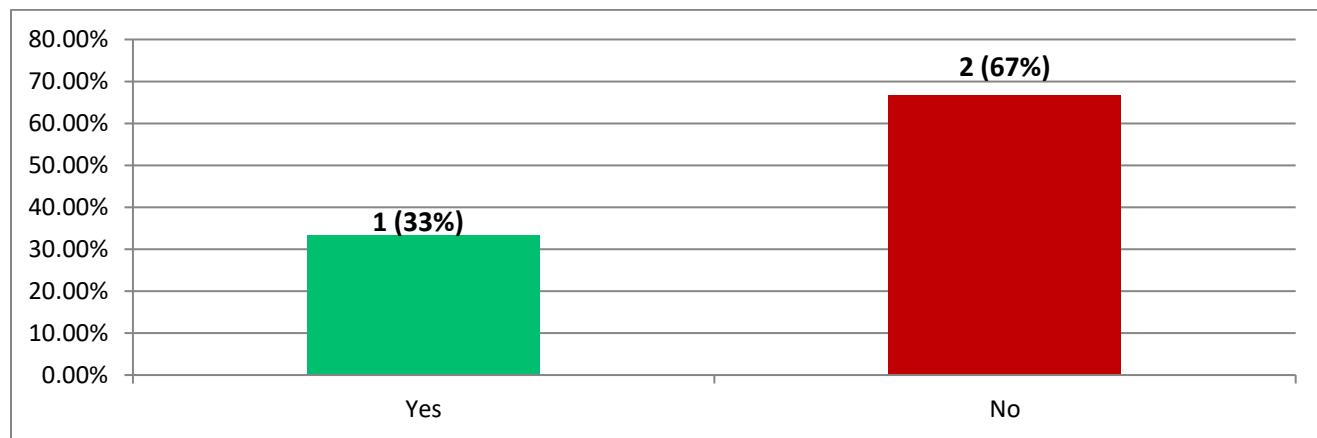


Table 21 is a follow-up to the respondent who expressed interest in **renting the facility for camp play**. The respondent was asked to list the camp play they might potentially host if the facility was open in 2021. The respondent indicated they would potentially rent 6 courts, 12 hours per month, for daytime play from May through September.

Table 21. *Responses to camp play*

Name	Camp Play	Month	Weekend/ Weekday	Day/Evening	Number of Court(s)	Number of Hours Per Month	Gender	Age Division
Brian Calimpong	Camp Play #1	May	Weekend	Daytime	6	12	Both	Youth
	Camp Play #2	June	Both	Day time	6	12	Both	Youth
	Camp Play #3	July	Both	Daytime	6	12	Both	Youth
	Camp Play #4	August	Both	Daytime	6	12	Both	Youth
	Camp Play #5	September	Weekend	Daytime	6	12	Both	Youth

Table 22 shows responses to the question pertaining to **facility rates for the use of tournaments, practice, league, and all other plays**. Ten individuals responded to the question. The responses show that the facility rates respondents are willing to pay vary from \$0 to \$250 depending on whether they are charged hourly, daily, or through partnerships with other organizations.

Table 22. *In general, what is the hourly rate you pay per court for similar facilities that you rent for tournaments, practice, league, etc.?*

Name	Tournament	Practice	League	Other
Donna Donaghy	Usually between \$150 to \$250 per court	N/A	N/A	N/A
Mark Hall	The cost depends on non-profit vs. other status. \$50 to \$85 per court.	N/A	N/A	N/A
Barry Peters	\$25	\$25	N/A	N/A
Todd Sears	\$15 to \$20	N/A	N/A	N/A
Kathleen DeBoer	Partnership with local CVB-Sports Authority - trade out courts for traffic in hotels and restaurants.	N/A	N/A	N/A
Frank Lavrisha	Big West/WCC Showdown (6 collegiate teams), \$55 per court per day, City of Santa Cruz.	N/A	N/A	N/A
Brian Calimpong	\$25 per court, per hour	\$25 per court per hour	\$25 per court per hour	N/A
Alex Jones	\$20	\$20	N/A	N/A
Fernando Sabla	N/A	N/A	N/A	\$50 to \$100 day
Shannon Oberg	N/A	\$0	N/A	N/A

Table 23 shows the responses to the question pertaining to **spectators**. Nine individuals responded to the question. Responses indicate that the number of spectators varies for tournaments, with the occasional attendance by parents. Four respondents reported at least ten spectators during practice.

Table 23. *In general, how many spectators might be anticipated per hour of use when you use courts for the following.*

Name	Tournament	Practice	League	Other
Donna Donaghy	Not many, some parents	N/A	N/A	N/A
Mark Hall	It depends on whether it is an adult or junior event.	N/A	N/A	N/A
Barry Peters	50+	10+	N/A	N/A
Todd Sears	100	N/A	N/A	N/A
Kathleen DeBoer	2020 AVCA SCBC has 25 college teams. Each brings 20 to 25 parents.	N/A	N/A	N/A
Frank Lavrisha	100+ spectators for the day	N/A	N/A	N/A
Brian Calimpong	30	10	30	N/A
Alex Jones	50	10	N/A	N/A
Shannon Oberg	N/A	12	N/A	N/A

Table 24 shows the responses to potential **overnight stays** during tournaments, league play, practice play, etc. Four people responded to the question. Of the four respondents, two indicated there will be overnight stays if tournaments are two or more days. In that case, they will rent more than ten rooms with two guests per room.

Table 24. *Responses to overnight stays*

Name	Start Date	Number of overnight stays	Number of hotel rooms	Number of guests per room	Comments
Mark Hall	N/A	N/A	N/A	N/A	Again, I can't really respond to this question. My events are one day and most teams will commute for the day.
Kathleen DeBoer	April 4	3	10+	2	For the current AVCA Small College Beach Championships, we contract 650 room nights in the local area from April 15 to 19. We partner with the Florida Region of USA Volleyball and the Lake County CVB to cover costs of courts and labor; AVCA schedules teams and officials.
Frank Lavrisha	March 7	2	10+	2	We would arrive the night before a two-day tournament and leave after the final day's competition was complete.
Fernando Sabla	N/A	N/A	N/A	N/A	To be determined

Respondents were asked if there are any “**like facilities**” to whom the city should reach out to gain additional insight on facility operations and costs. Responses are shown in Table 25.

Table 25. *Are there any “like facilities” in California that the City of Morgan Hill should contact to better understand use and cost patterns at their facilities?*

Name	Response
Donna Donaghy	City of Santa Cruz and West Valley College
Mark Hall	I would think the courts at Main Street Beach would be the closest thing to this. There are 16 courts there that are used by both recreational and tournament organizations. They have an established pay matrix for varied use.
Barry Peters	West Valley College: Donna Breckenridge; (408) 741-2650 donna.breckenridge@westvalley.edu Santa Cruz Main: Daniel Lawson (831) 420-5267 DLawson-Thomas@cityofsantacruz.com
Kathleen DeBoer	I don't know of any inland facilities of this type in California. Hickory Point Beach in Tavares, Florida, is a 21-court facility. They are managed by the Florida Region of USA Volleyball. The Executive Director is Steve Bishop.
Brian Calimpong	West Valley College
Alex Jones	West Valley College
Fernando Sabla	Wave Volleyball Club
Shannon Oberg	Northern California Volleyball Association

Respondents were asked if they know someone or an organization that may be interested in **contracting with the City to manage the facility as an operator**. Table 26 shows the responses.

Table 26. *Do you know someone or an organization that may be interested in contracting with the City of Morgan Hill to manage the facility as an operator?*

Name	Response
Donna Donaghy	The Northern California Volleyball Association
Kathleen DeBoer	Donna Donaghy, Commissioner, Northern California Volleyball Association, donna@ncva.com
Brian Calimpong	Myself
Alex Jones	Myself

Respondents were asked if they know someone or an organization that may be interested in **sponsorships or naming rights** of the facility. Responses are shown in Table 27.

Table 27. *Do you know someone or an organization that may be interested in sponsorships and/or naming rights for the facility?*

Name	Response
Barry Peters	Many opportunities, best to look at sponsors of AVP and AAU events, e.g., Wilson, Jolyn, Oakley, etc.

Respondents were asked if they know someone or an organization that may be interested in **contracting to build the facility for the City**. Responses are shown in Table 28.

Table 28. *Do you know someone or an organization that may be interested in contracting to build the facility for the City of Morgan Hill?*

Name	Response
Donna Donaghy	We have heard of someone in Southern California I can look into it.
Mark Hall	I do not know of any person with this kind of experience. I do have 40 years of experience of playing, organizing large scale events, and maintaining the courts at Main Beach. I would definitely have more than a few suggestions to add to the process to make sure these courts will be built at the highest standard. Have you thought about reaching out to the local soccer club to see if they would be interested in hosting sand soccer events there?
Barry Peters	Sand Court Experts: Butch Hendrick/(352) 267-1670/SandCourts@comcast.net
Todd Sears	https://www.sandcourtexperts.com
Kathleen DeBoer	Sports Imports is the leading provider of net systems and volleyball equipment in the United States. Their California contact is Tucker Day. email: tday@sportimports.com

Respondents were asked if they knew a(n) individual, team, or organization that might be interested in **privately funding the facility**. Responses are shown in Table 29.

Table 29. *Do you know any individual(s), team(s), and/or organization(s) that may be interested in privately funding the proposed facility? If so, please identify and provide their contact information if available.*

Name	Response
Mark Hall	Not at this time
Barry Peters	No
Brian Calimpong	No
Alex Jones	No

Respondents were asked if there are **any other individual, team, or organization** the City should contact for the **possible use of the facility**. Responses are shown in Table 30.

Table 30. *Do you know any other individual(s), team(s), and/or organization(s) that the City should contact related to the possible use of their proposed facility? If so, please identify and provide their contact information if available.*

Name	Response
Donna Donaghy	Table 31. NCAA / P1440 / USAV
Mark Hall	Table 32. I am pretty certain that you know of the NCVA, and they are the major organization with the Bay Area Volleyball Community. The sand soccer craze is growing too, and I know there is a lot of competition to secure weekends on the beaches in front of the boardwalk.