

GGA  Partners



2026 Uplands Open House Presentation

Uplands Golf Club

June 2026

First Tee Pressure Task Group

Guide to Today's Presentation

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Introduction to the Uplands Golf Club First Tee Pressure Task Group

The First Tee Pressure Task Group has been created by the Board of Directors as an ad hoc committee to research options which could address member concerns about access to the first tee, and to develop options and recommendations for consideration by the membership. The Task Force is assisted in its work by GGA Partners

The membership of the Task Group is:

Gord Macatee – Co Chair

Terry Wright – Co Chair

Nicola Komlodi

Mike Nugent

Anil Kapur

Simon Gatrell (ex officio)

Ian Stone (ex officio)

The Task Group has divided its work into three main phases

- Assess the scope of the first tee challenge through data analysis and member survey and communicate findings to the Board and Membership
- Identify options to address the challenge and develop guiding principles to help evaluate options
- Communicate options and recommendations to the Board and Membership

Introduction to GGA

GGA Partners (formerly Global Golf Advisors Inc.) originated in 1992 as a specialty consulting practice within KPMG. GGA initially focused on the interrelationship between clubs and associated residential real estate, and resort developments. However, over the past decade, it has expanded its focus to projects that include all types of clubs and related leisure pursuits.

The company has grown to serve over 3,500 clients across the globe with offices in Toronto, Canada, West Palm Beach, Florida, Phoenix, Arizona, and Dublin, Ireland serving Europe, the Middle East, and Africa.

Uplands Golf Club ("Uplands", or the "Club") engaged GGA Partners ("GGA") to undertake a Capacity Study and Strategic Member Survey, delivered as two integrated workstreams designed to support the Club's upcoming strategic plan update. The Strategic Member Survey was designed to both inform the Capacity Study and highlight initial areas of strategic priority for the Board, capturing member perspectives on access, categories, value, policy tolerance, and broader strategic direction, with results analyzed by membership category, age, and tenure to provide decision-ready input to the scenarios and policy options under consideration.

GGA began in 1992 as a specialist Golf Industry Practice at KPMG, a major international accounting and consulting firm.



In 2006, the founding partner coordinated the separation of the practice from KPMG, creating a boutique management consulting firm now known as GGA Partners (GGA).



3,500+ clients
across four global offices

In 2023, GGA Partners was acquired by ClubWorks, the only wholly-owned network of elite professional services firms for every stage of development and evolution in the private club, real estate and hospitality industries.



ClubWorks Portfolio



Management Consulting



Integrated
Marketing Agency



Master Planning, Design &
Architecture



Master Planning, Design &
Architecture



Master Planning, Design &
Architecture



Architectural
Animation and
Visualization



Video Production



Mechanical, Electrical,
Plumbing and Fire
Protection Services

Golf Since Covid

- Since 2021 Uplands membership has been playing on average 7% more rounds than pre-Covid (about 4,000-5000 more rounds per year)
- Given the fixed capacity of the golf course in terms of total prime time rounds – the additional rounds played has helped to create significant pressure on the first tee.
- This pressure has not reduced post covid – as the frequency of play pattern has continued and playing habits developed during the pandemic have remained in place. The increase from pre pandemic use is primarily active members
- Post Covid travel patterns have not entirely returned to pre-covid norms – likely due in part to more geopolitical uncertainty, US politics, currency depreciation, etc.
- GGA reports that this challenge is common to Clubs across Canada

Tee Time Capacity – Prime Time

- For analysis purposes the Task Force defined “Prime Time” rounds as rounds that begin with the first available tee time and conclude with rounds that complete by 5 pm (or darkness in the shorter daylight months)
- These time boundaries were picked as “prime time” as they enable a member to complete their round comfortably before the dinner hour. The definition is arbitrary, but it helps to set the context for first tee access issues.
- Using this definition, Uplands has capacity for 45,400 “prime time” rounds a year starting at the first available tee time and finishing with a 1 pm tee time.
- The figure of 45,400 is net of the week given to the PGA Tournament and the days/half days given to a few other external tournaments – which total about 3% of available Prime Time Rounds.
- The 45,400 figure is also net of an allowance of 5% for lost rounds due to weather – rain, snow, frost, etc. which the pro shop advise is a reasonable average of lost time

Prime Time Tee Time per Active Member

- To understand the nature of the first tee access challenge, we spread the available 45,400 rounds over the 700 active members.
- Spreading these rounds evenly over our active membership would allow for 1.25 rounds per week or 65 rounds per year in the Prime time (slightly fewer in the winter and slightly more in the summer).
- If all our active members played their 1.25 rounds per week – all but the first 1.25 rounds per week would begin after 1 pm – and this number assumes all rounds played are foursomes and no in house events, etc that further reduce tee time availability
- These calculations do not include the use of the course by seniors, intermediates, juniors and guests.
- These calculations do not include the remaining opportunities for about 17,000 more rounds of 18 holes for tee times after 1 pm which represents capacity that can be used by all members as well as a similar number of 9 hole rounds
- Note - GGA has advised that shortening the tee time interval from 9 minutes to 7 minutes does not result in more capacity – as the congestion that occurs on course lengthens the round time and creates backups that reduce overall round capacity. They report that 9-min or 10-min intervals is the standard for their clients.

This is the quandary we face – Demand for Prime Time Tee Times by Active Members Exceeds Supply

Jonas System (From our Website)

- GGA consider Jonas a very strong system and point out that it's a Canadian product (owned by Constellation Software – a \$57 billion enterprise). Jonas's software is used at over 5,000 clubs in North America and in countries around the world. Jonas is also used at Uplands to manage accounting, point of sale and website functions.
- The Jonas Tee Time Management System has been in use at Uplands since 2014. It is a software module for allocating tee times in a fair and equitable manner and for managing the tee sheet on an ongoing basis.
- The points and the 60-day rolling period are variables that the Club can set and the Task Force will be analyzing whether there is a better points structure as part of its next steps
- If you add your name after the draw is prepared, you will not receive points unless you are a no show or cancel less than 61 minutes before that time.
- If you play in a blocked session – men's night, women's day, club fixtures, directors' times, etc. – you do not accumulate points

Jonas System (from our website)

- Tee times are prioritized through the Jonas Tee Time Management System, specifically the lottery system which operates on a complex points system. Points are assigned to individuals based on three factors as follows:
 - **Category Points** - Each person is assigned starting points based on their member category as detailed below. These starting points are assigned to an individual once only for the last 60-day rolling period. Points vary depending on the member's category with active members assigned the fewest number and guest of members assigned the most.
 - **Proximity Points** - Points also accumulate based on the individual's 60-day history of getting tee times in proximity to that requested as detailed on the next slide.
 - **Cancellation Points** - Points also accumulate based on the individual's cancellation habits. These cancellation points vary based on the timing of the cancellation
- Tee Time Performance is a factor of the popularity of the tee time requested, the member's point balance and the point balance of the other members on the ballot

Uplands Golf Club: Jonas System Overview

• Weekly Draw

- Each week a draw is conducted. The draw is run in three iterations for each day of the following week, commencing on Tuesdays and finishing on Mondays
- The first iteration is for active members only and prioritizes foursomes over threesomes and threesomes over twosomes prior to running the algorithm using accumulated points
- The second iteration includes all ballots that are not exclusively active members, except for any ballots including guests and TBD
- The third iteration is for any remaining ballots that include a guest or a TBD.

Category Points (Base)		Proximity Points		Cancellation Points	
Membership / Player Type	Starting Points Allocated	Tee Time Variance from Booking Request	Points Allocated (Per Tee Time)	Time to Cancel – Time from Tee Time	Points Allocated (Per Cancellation)
Active / Restricted / Honorary	10	Within 18 minutes of request	10	No Show (does not cancel)	50
Senior / Non-Resident	100	Within 19 – 36 minutes of request	8	Within 18 minutes of tee time	10
Intermediate	700	Within 37 – 63 minutes of request	6	Within 19 – 36 minutes of tee time	8
Junior	900	Within 64 – 81 minutes of request	3	Within 37 – 60 minutes of tee time	4
SWA / SWA OT	1000	82 + minutes from request	0	61 + minutes from tee time	0
TBD	1250				
Guest of Member	1500				

Jonas System Audit

- Many members have expressed concerns about Jonas – but this is not a unique concern – Simon chairs the Vancouver Island Branch of the Club Managers Association of Canada and notes that most Clubs report their members have concerns about their tee time access program, no matter which software is being used.
- Given the concerns expressed about Jonas the Task Force commissioned an audit of Jonas by GGA to test:
 - Points awarded – a random selection of 20 members were selected by GGA and their points accumulation for a 60 day period was checked to ballot and tee sheets.
 - Results of the Audit – the random sample of 20 members covering 610 rounds was tested and found compliant with the Jonas overview set out on our website
- The Task Force is also seeking an independent audit of the Jonas algorithm used to manage the ballot and tee time assignment process. We are awaiting confirmation that Jonas can provide the required information to GGA to allow them to complete the tee time allocation portion of the audit

GGA's Data Analysis

Over the past several months, GGA's Engagement with Uplands Golf Club has included a complete analysis of golf utilization and capacity at the Club, as well as a member survey. Further details on each can be found below:

Utilization and Capacity Study

GGA has analyzed golf utilization at Uplands Golf Club in both 2024 and 2025, including a detailed analysis of all tee sheet rounds data and lottery request data provided. This allowed GGA to consider a broad spectrum of topics, including:

- Overall trends in rounds played
- Non-Member rounds
- Member rounds by category
- Utilization trends at Uplands
- Lottery access and success for various member groups

Member Survey

GGA also developed and issued a member survey, distributed to members in early April. 527 members completed the survey, allowing GGA to compile results and themes emerging from Uplands members.

Key learnings from the utilization and capacity study, as well as the member survey have been included in today's presentation.

Active play is skewed toward heavy use, with 52% of active members playing above 60 rounds and 21% of our active members playing 46% of the rounds played by active members.

- 30% of our Active members play 7% of the rounds, 38% play 12% of the rounds
- 47% of our Active members play one or fewer times per week – or 27% of the rounds played by active members
- 21% of our Active members play 46% of the rounds played by active members
- The average number of rounds per Active Member (Prime Time and Non-Prime Time) is 72 rounds per year

2025 Rounds Played by Active Members

Hour	0 - 9 rounds	10 - 19 rounds	20 - 29 rounds	30 - 39 rounds	40 - 49 rounds	50 - 59 rounds	60 - 69 rounds	70 - 79 rounds	80 - 89 rounds	90 - 99 rounds	100 + rounds	Total
Active Members (Count)	50	50	60	46	54	64	62	64	42	47	145	684
% of Total Active Members	7%	7%	9%	7%	8%	9%	9%	9%	6%	7%	21%	100%
Total # of Rounds	153	739	1,479	1,593	2,413	3,504	4,011	4,772	3,523	4,406	22,849	49,442
% of Total Active Rounds	0%	1%	3%	3%	5%	7%	8%	10%	7%	9%	46%	100%

Lottery results worsen as members play more golf as the algorithm is designed to do, but the decline is gradual, so all users still enjoy relatively strong outcomes.

- Members playing 1 to 19 rounds experience an average variance of about 21 minutes from their requested tee time, compared to roughly 48 minutes for those playing more than 100 rounds, which is a meaningful but not dramatic difference.
- The 100-plus group receive their requested time 40% of the time and within an hour 67% of the time
- Note – Tee Time Performance is a factor of the popularity of the tee time requested, the member's point balance and the point balance of the other members on the ballot

2025 Lottery Data - Interval From Preferred Time

2025 Rounds Played	0 – 60 minutes	61 – 120 minutes	More than 120 minutes	Weighted Avg (minutes)
1 – 19 rounds	85%	8%	7%	21.4
20 – 39 rounds	79%	11%	10%	29.9
40 – 59 rounds	76%	11%	13%	36.1
60 – 79 rounds	72%	13%	15%	40.6
80 – 99 rounds	70%	14%	16%	43.7
100+ rounds	67%	15%	18%	48.3

Summer months deliver the best lottery outcomes, while winter and shoulder months show higher variance due to tight daylight windows.

- This pattern suggests that member frustration may be highest in periods when they expect the course to feel “quiet” but access still feels constrained due to limited daylight in the winter.
- It may be appropriate to set different service standards for acceptable variance in winter versus summer and to communicate these standards explicitly to manage expectations.
- We have about 29 prime time tee times available in winter, vs 36 in summer. **There are no non-prime time 18-hole tee times available in winter vs approx. 30 per week available in summer.**

2025 Lottery Data – Interval From Preferred Time

Month	0 – 60 minutes	61 – 120 minutes	More than 120 minutes	Weighted Average (minutes)
January	55%	20%	25%	62
February	70%	14%	16%	45
March	64%	18%	18%	51
April	67%	15%	18%	46
May	76%	11%	13%	38
June	79%	10%	11%	33
July	76%	13%	11%	34
August	73%	12%	15%	38
September	74%	11%	15%	39
October	64%	17%	19%	51
November	66%	16%	18%	51
December	63%	16%	21%	54

Fridays and Saturdays are the busiest days for preferred times, while Thursdays perform best under the current lottery.

- On Fridays, nearly one quarter of lottery tee times land more than two hours from the requested time, which is significantly worse than other days and consistent with high utilization.
- Thursday's results confirm that the current men's day design, combined with the lottery, is managing demand reasonably well on that day.
- Any policy package should likely include day specific levers, such as stricter point penalties or guest restrictions on Fridays and Saturdays, rather than a uniform approach across the week.

2025 Lottery Data – Interval From Preferred Time

Day of the Week	0 – 60 minutes	61 – 120 minutes	More than 120 minutes	Weighted Average (minutes)
Sunday	65%	15%	20%	50
Monday	66%	15%	19%	49
Tuesday	73%	15%	12%	38
Wednesday	71%	12%	17%	42
Thursday	86%	11%	3%	22
Friday	60%	17%	23%	56
Saturday	62%	18%	20%	54

On average, tee times are about 51 minutes away from their requests, with 44% of requests matched exactly, though some age-based categories receive less favorable lottery results.

- The Club's informal standard is that receiving a time within 81 minutes of the request at least half the time is considered acceptable; current performance is close to this benchmark but skewed by a small share of requests that are placed more than three hours away.
- Seniors and Intermediate 3 members have among the poorest lottery results on average.

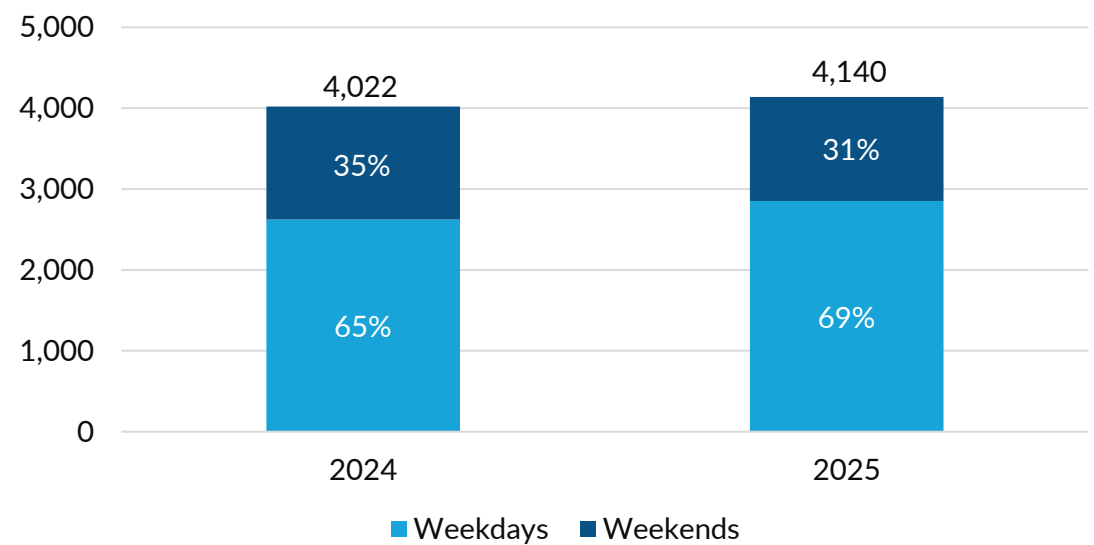
2025 Lottery Data – Interval From Preferred Time

Membership Category	Member Count	Starting Points Allocated?	0 – 60 minutes	61 – 120 minutes	More than 120 minutes	Weighted Average (minutes)
Active	684	10	71%	14%	15%	47
Junior	76	900	65%	19%	16%	50
Intermediate 2	46	700	67%	17%	16%	49
Social	45	N/A	63%	19%	18%	55
Senior	44	100	57%	35%	8%	53
Intermediate 1	42	700	75%	14%	11%	43
Intermediate 3	35	700	51%	25%	24%	72
SWA	33	1000	72%	19%	9%	41
Non-Resident	25	100	69%	11%	20%	52
Active Restricted	4	10	60%	9%	31%	71
Overall Average			69%	16%	15%	51

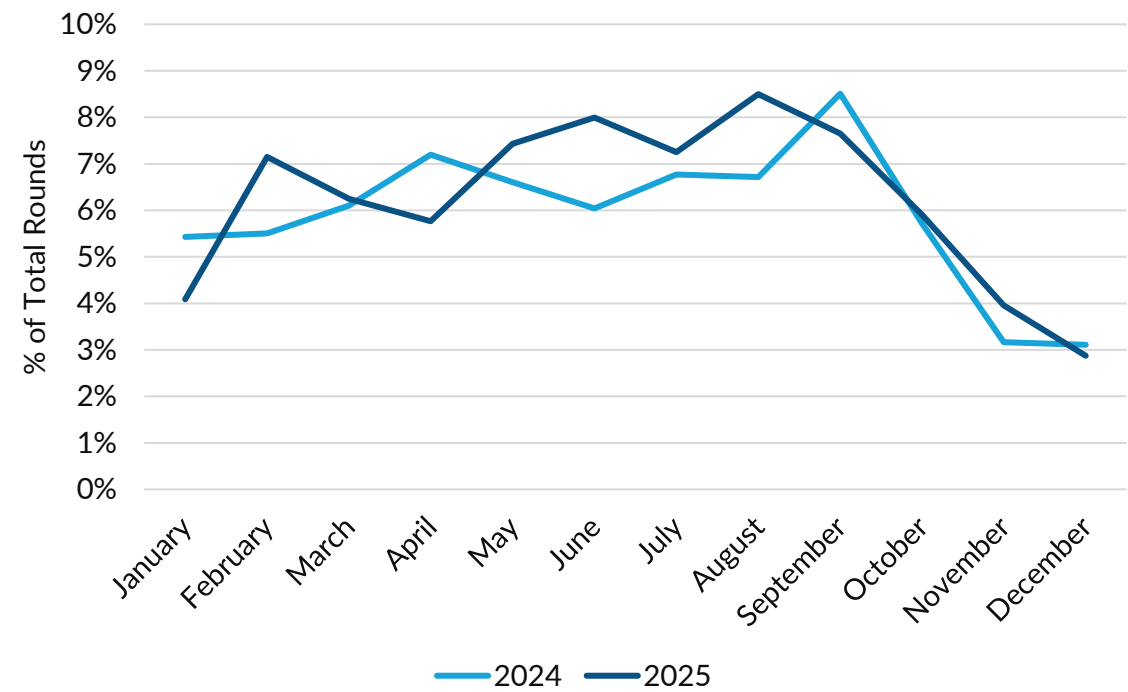
Non-member rounds are stable at roughly 4,000 per year and now occur more often on weekdays.

- Non-member rounds represent a relatively small share of total rounds, so eliminating them would not solve the capacity issue but could have outsized financial and relationship impacts as well as impacts on reciprocal privileges.
- The weekday concentration suggests that current guest policies are already aligned with a strategy of protecting weekends for members.
- Further work can still test modest refinements to guest access and pricing, but the focus should remain on member behaviour and category policy.

Non-Member Rounds Played by Day (2024 - 2025)*



Non-Member Rounds Played by Month (2024 - 2025)*



Year	Total Non-Member Rounds*
2025	4,140
2024	4,022

* Using 'Non-Member Reservations Report' Data



Member Survey Methodology and Response Rate



Survey Process

- The survey was facilitated by GGA and was distributed via Alchemer, a leading online survey software.
- Emails were sent to each member individually containing their personal survey link to ensure no duplicate surveys were received.



Timeline

- The survey was distributed on April 7th, 2026.
- Respondents were given nearly two weeks to complete the survey, with a deadline of April 19th, 2026.



Response Rate

- A total of **527 surveys were completed** by Uplands members out of **1,071 total** surveys sent.
- The Club achieved a **response rate of 49%** which falls within an acceptable confidence interval as noted below.

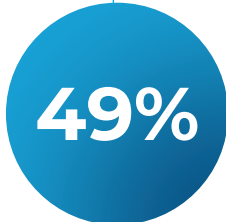


Statistical Significance

- The survey results are statistically significant to **+/- 3.0% confidence interval** at a 95% confidence level, meaning the results would not vary more than +/- 3.0% if the survey was answered by the entire membership, 19 out of 20 times.



Completed
Responses

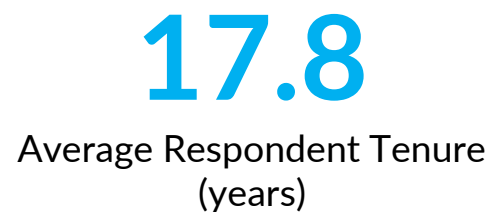
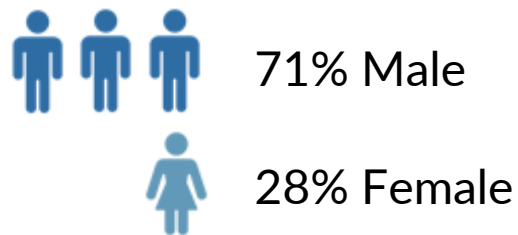


Response
Rate



Margin of
Error

The survey was responded to by a higher proportion of active / active restricted / honorary members than the overall membership, with 82% of respondents identifying as active / honorary members.



- 82% Active / Honorary (vs. ~65% membership at Large*) – Approx. Response Rate: ~62%
- 6% Intermediate (vs. ~11%) – Approx. Response Rate: ~25%
- 5% Senior (vs. ~4%) – Approx. Response Rate: ~59%
- 4% Social / Social Complimentary (vs. ~12%) – Approx. Response Rate: ~15%
- 3% Social Waiting for Active (vs. ~3%) – Approx. Response Rate: ~40%

*Membership at large excludes junior memberships

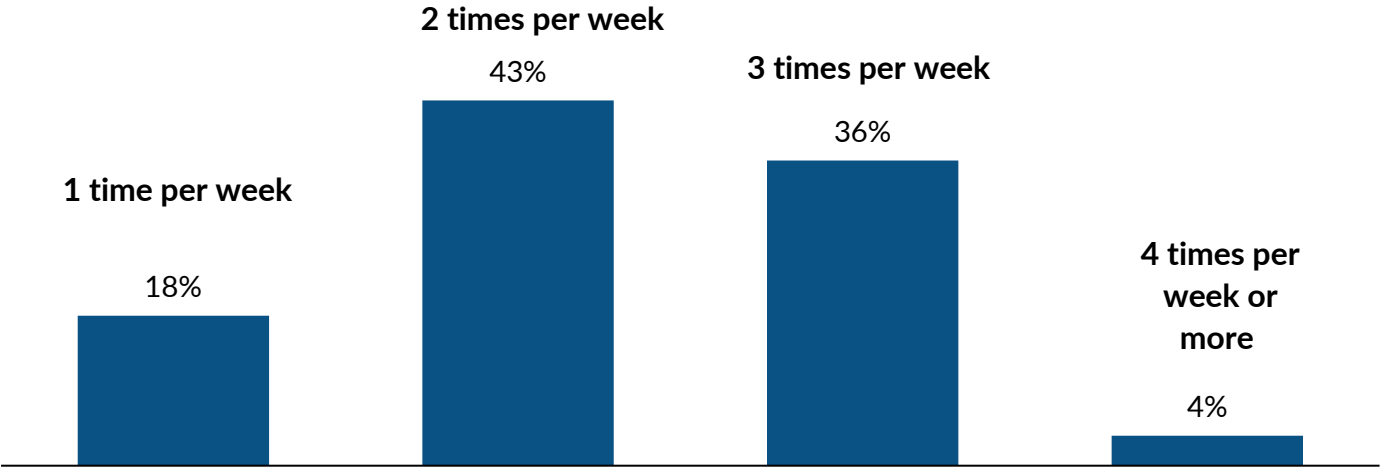
Member satisfaction at Uplands is strong overall, but access to the tee rated low and members' views are that intensity of use, not membership size, is the root issue.

- 1. Overall satisfaction remains strong and above benchmark** -Overall satisfaction sits at 4.30/5 with 89% of members satisfied or very satisfied, and value for membership (4.05/5) also ranks above the benchmark range, a solid foundation from which to address targeted issues.
- 2. Net Promoter Score** (willingness to recommend UGC to prospective members) has declined from 55 in 2024 to 40 in 2026, a 15-point drop that signals access friction might be beginning to erode willingness to recommend.
- 3. Access to the tee is the only below-benchmark metric** -Peak-season tee access (2.88/5) is the single lowest score in the study, could be considered the most significant pain point.
- 4. Members support restricting heavy user's lottery access** - A majority (56%) agree that heavy users should have reduced lottery priority, and just 16% consider the current high-use pattern acceptable, directly aligning with the utilization data that intensity of use, not membership size, is the core issue.
- 5. Even the heaviest users are dissatisfied with current access** - Members playing 110+ rounds rated overall tee access at 2.7/5, the lowest of any usage band.
- 6. Satisfaction improves with age** - Satisfaction with access to the tee in peak season generally improves with age, as the Club's oldest members indicated the highest overall satisfaction with access to the tee.
- 7. Active members benefit from the priority structure** within the lottery system, achieving tee times at or within 60 minutes of their preferred slot 71% of the time.

Access Experience and Satisfaction

For those who use lottery: When you participate in the weekly tee time lottery, how many tee time requests are you typically included in? (454)

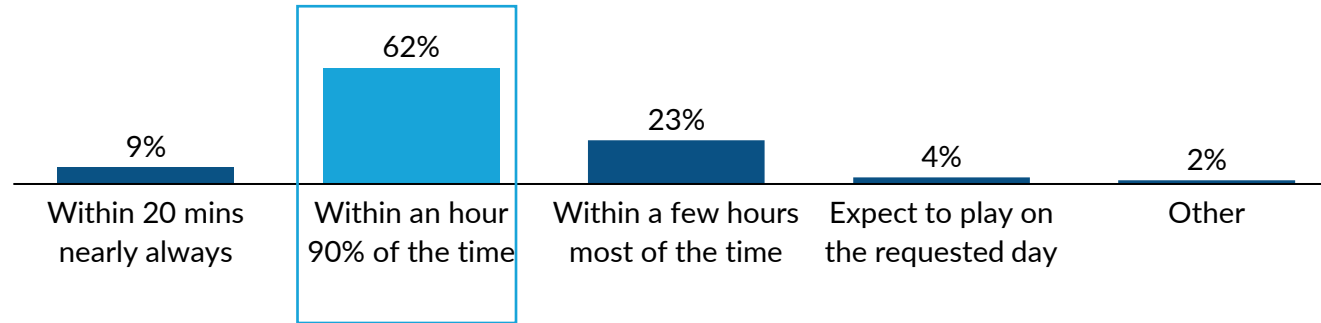
Weighted Average: 2.3



40% of Active members are balloting for 3-4 rounds per week

Member expectations for lottery performance are significantly higher than the Club's current operating standard – leading to overall dissatisfaction

Lottery Access Expectations:



- In general, the club's long-standing policy considers receiving a lottery request within 81 minutes of their request 50% of the time as acceptable.
- 71% of respondents currently expect to receive their tee time within an hour or closer to their request (9% within 20 minutes, 62% within an hour).

Members showed the most support for lottery improvements that would differentiate based on frequency of play

Preferred Lottery Policy Direction (Top 5):

What booking and lottery improvements would you most like to see? (Select up to three)	Overall	Membership Category		
		Active / Honorary	Senior	Inter.
Better differentiation between heavy / light users	43%	44%	42%	46%
Clearer explanation of lottery point system	38%	40%	33%	21%
Remove the 'TBD' designation to hold tee times	37%	37%	50%	29%
Stronger penalties for no-shows and very late cancellations	36%	36%	29%	46%
Consistent communication about expected variance by season or day	24%	26%	17%	14%
Respondent Totals	470	390	24	28

Access Experience and Satisfaction

For those who golf: Is there a specific situation where you have felt access was particularly frustrating? (277)



Lottery assigns tee times hours away from requested times



Prime tee slots blocked by leagues, events, and tournaments

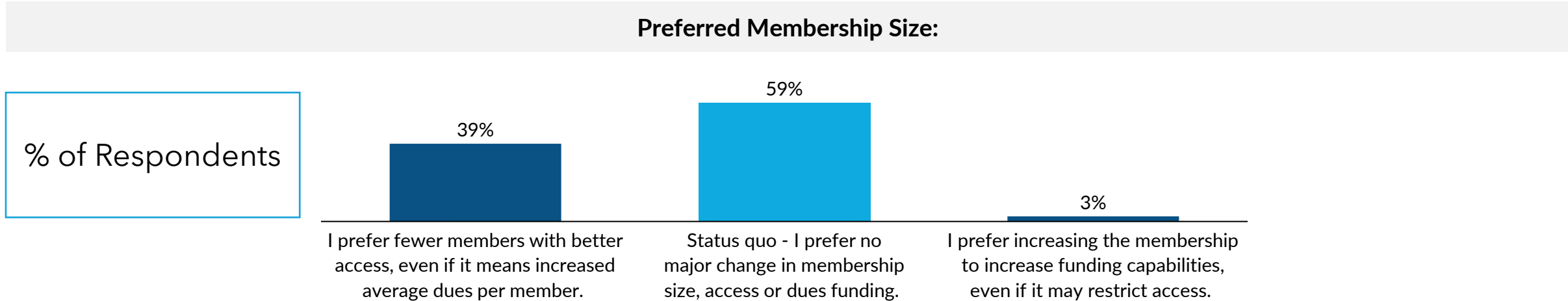


Perceived unfairness, 'gaming the system', and lack of system transparency



Difficulty booking guests at reasonable, host-friendly times

Members prefer the current membership size and instead direct the Club toward managing intensity of use.



Crosstab Insights 🔍

- Intermediate members were among the least likely to support fewer members with better access, at 31%.
- The longest tenured Uplands members were the most likely to support fewer members with better access, at 45%.
- 14% of members who have joined within the previous two years indicated a preference to increase the membership, highest of any tenure grouping.

56% of Uplands members agree (vs 23% who disagree) that members who play very frequently should have less lottery priority than members who play infrequently.

Views on Access:

Statement	Disagree	Neutral	Agree	Rating
Members who play very frequently should have less lottery priority than members who play infrequently.	23%	21%	56%	3.51
I trust that current lottery system allocates points appropriately according to the rules.	28%	31%	42%	3.21
Members should have roughly equal access to preferred tee times within their membership category rights, regardless of how often they play.	33%	21%	45%	3.20
I am satisfied with the way the current lottery system allocates access.	42%	33%	25%	2.70
It is acceptable for some members to play a very high number of rounds per year, even if this makes it harder for moderate users to get preferred times.	55%	28%	16%	2.40

Crosstab Insights

- Members under 40 years of age, and those 81 years of age or older were least likely to agree that members who play frequently should have lower lottery priority, at 3.2/5 and 3.1/5 respectively.
- Members that played 110 rounds or more at Uplands provided the lowest ratings of any grouping for three out of the five statements; members who play frequently should have lower lottery priority (3.0/5), trust in the current lottery system (2.8/5), and satisfaction with the current lottery system (2.5/5).

Next Steps

- Task Force to establish principles to guide possible solution development and consideration
- Task Force to develop possible solutions and share with membership at the September open house
- Task Force to Host open house in mid September

Possible Solutions

- Committee has completed initial research and received advice from GGA on what other clubs are doing to manage first tee access challenges
- Options to Improve Supply of Tee Times:
 - Shift more demand to non-prime times
 - Mandatory foursomes during prime time
 - Penalties for Jonas manipulation (balloting with member names who are away, switching to TBD's after the draw) through T Sheet audits
 - Restricted play (active members only) on weekend mornings
 - Strict no show penalties and cancellation rules
 - Create 9-hole options
 - Adjust tee time intervals

Possible Solutions (continued)

Options to Reduce Demand for Tee Times

- Reduce or altering Membership structure
- Apply points for all rounds booked, including blocked bookings, tournaments, Directors' times
- Reduce number of allowed ballots per week (no limits on post draw bookings)
- Eliminate TBDs
- Shortened booking windows
- Increase charges for rounds over a monthly cap
- Reviewing the points system for proximity points

Options to Reduce Complaints

- Change members expectations for tee time access
- Annual Jonas Audit
- Improved Transparency about member Jonas Points

The Committee will review and evaluate these options along with other emerging trends and make recommendations to the Board and membership in September