



COUNTY ADMINISTRATOR'S OFFICE

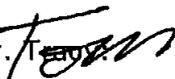
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C.H. HUCKELBERRY
County Administrator

September 15, 2008

Tom Tracy
Southern Arizona Lodging and Resort Association
6430 North Leonardo Davinci Way
Tucson, Arizona 85704

Re: **Chicago White Sox Proposal Regarding Substitute Economic Development Activity
for Their Tucson Spring Training Activities**

Dear Mr. 

The attached report has been received as part of a proposal by the Chicago White Sox to Pima County for the purpose of requesting that the County release the Chicago White Sox from their remaining Spring Training contractual obligations in Pima County. As background, the Chicago White Sox have entered into a Spring Training contract with the City of Glendale, which includes the Los Angeles Dodgers, to conduct Spring Training activities in a new Glendale stadium costing in excess of \$100 million, financed in large part from the Arizona Sports and Tourism Authority of Maricopa County. The stadium is nearing completion and Spring Training for the Los Angeles Dodgers as well as Chicago White Sox is scheduled for 2009; however, in order to do so, the Chicago White Sox requires Pima County to release them from their contractual obligation to 2012.

The proposal set forth by the Chicago White Sox is intended to demonstrate an equivalent or better economic development option for Pima County and the region. Summary benefits and/or impacts from the alternative proposal are:

Youth Baseball Tournament Facility

Among the highlights of Elliott Pollack & Company's study, funded by the Arizona Department of Commerce.:

- The Youth Baseball facility is expected to generate \$46 million of economic impact annually for Pima County and Tucson, \$35 million more than White Sox Spring Training does each spring;

Tom Tracy

**Chicago White Sox Proposal Regarding Substitute Economic Development Activity for Their
Tucson Spring Training Activities**

September 15, 2008

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- Over the next four years, the new facility is expected to generate \$160 million in economic impact, \$119 million more than the White Sox would create based on the term of the team's contract with Pima County (through 2012);
- The impact includes almost \$43 million in additional wages over the next four years and the creation of 452 additional jobs;
- The new facility would generate tax revenues of \$1.1 million for Tucson, \$871,870 for Pima County, and nearly \$1.7 million for the State of Arizona annually.

Some of the highlights of the proposed new Youth Baseball Tournament Facility include:

- This will be an elite youth baseball facility, featuring eight Major League quality fields configured for a variety of age groups, lighted, and with grass infields;
- The White Sox would own and operate the facility through an operating agreement with the County, longer term than the team's current contractual commitment in Pima County;
- This would be one of very few facilities affiliated with Major League Baseball (through the Academy) and Youth Facility, and as part of that year-round commitment in Tucson, has agreed to work with Pima Community College to develop a scholarship program;
- The White Sox will commit nearly \$3 million to convert the facility and will be responsible for most operations and maintenance; and
- The new facility will save Pima County a significant amount on annual operating costs with annual savings estimated between \$400,000 and \$700,000.

As you know, this region is at a competitive disadvantage when it comes to attracting and retaining Major League Baseball Spring Training due to our lack of a similarly financed regional sports authority. Legislation to create such an authority failed to be approved by the Legislature during the last session. Hence, the legislative and financial future of a Pima County sports authority as well as Spring Training activities is both unknown and uncertain.

We very much appreciate all the hard work of the Pima County Sports and Tourism Authority to pursue options regarding other Major League Baseball Spring Training teams. We understand how difficult this task is since most Major League Baseball teams, other than the Diamondbacks and the Rockies, have ongoing contracts for Spring Training activities that last until at least 2016.

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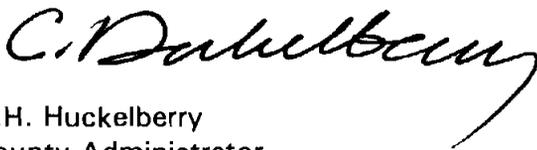
The options available to the County appear to be: A) accept the Chicago White Sox proposal or B) reject it. Accepting it has the consequence of not having the Chicago White Sox conducting Spring Training activities in Tucson for the 2009 season through 2012. Furthermore, this option cannot be accepted if it would cause either or both the Arizona Diamondbacks or Colorado Rockies to relocate their Spring Training activities. Rejecting the proposal would eliminate the Amateur Youth Baseball Academy option now being presented, require the Chicago White Sox to continue to do Spring Training in Tucson, probably through 2012, and then after 2012 face the possibility of not only the White Sox leaving, but also the Diamondbacks and Rockies.

The purpose of this letter is to request your review and comment on the proposal by the Chicago White Sox, including the Economic Development study that has been completed by them regarding the Amateur Youth Baseball Academy. Once comments have been received they will be forwarded to the Board of Supervisors for further action as necessary.

Please note that Appendix B contains a summary discussion of a Major League Baseball Youth Academy for Tucson. This is a commitment in addition to the Youth Baseball Tournament Facility. It should also be noted that the economic benefits of the Major League Baseball Youth Academy have not been included in this report.

I would appreciate your detailed review and comment on this proposal by October 15, 2008.

Sincerely,



C.H. Huckelberry
County Administrator

CHH/jj

Attachment

c: The Honorable Chairman and Members, Pima County Board of Supervisors
Hank Atha, Deputy County Administrator for Community and Economic Development
Tom Moulton, Economic Development and Tourism Director

Economic & Fiscal Impact of Tourism: A Comparison of the Proposed Youth Baseball Tournament Facility and the Chicago White Sox Departure Pima County, Arizona



Prepared for:

Pima County

September 2008

Prepared by:



Elliott D. Pollack & Company
7505 East 6th Avenue, Suite 100
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Key Findings

Out-of-town visitors attending spring training games of the Chicago White Sox have had a significant impact on Pima County's economy each year. However, the White Sox have announced plans to relocate to Glendale, Arizona as early as the 2009 season. Their current lease runs through 2012 in Pima County. This prompted the White Sox to seek an alternative use for after their departure of the leased portion of the Kino Sports Complex in Pima County. The proposed alternative use includes a world class youth baseball facility along with an expansion of the current practice fields. The new facility would be home to the proposed "Baseball Tournament Facility" as well as host a year-round youth league.

Elliott D. Pollack & Company was retained by Pima County to conduct an economic and fiscal impact analysis of the proposed Baseball Tournament Facility and compare the results to the departure of the Chicago White Sox spring training in Pima County, Arizona. The analysis was designed to estimate the impact that visitors have on the economy as well as on governmental revenues that are generated from tourist spending.

Economic impact analysis examines the regional implications of an activity in terms of three basic measures: output, earnings and job creation. Fiscal impact analysis, on the other hand, evaluates the public revenues and costs created by a particular activity. In fiscal impact analysis, the primary revenue sources of a city, county or state government are analyzed to determine how the activity may financially affect them. Elliott D. Pollack & company relied on the results and assumptions provided in a number of existing studies conducted by other firms. No surveys were conducted by this firm. Following are the results of the analysis:

- At stabilization, the Baseball Tournament Facility is expected to host 7,886 games that would attract 99,240 non-local visitors to Pima County each year. These tourists would spend \$27.6 million in the local economy annually. In comparison, the spring training games of the Chicago White Sox in March of each year attract an estimated 17,811 unique, non-local visitors that spend \$6.2 million during that month.

Economic Impact

- Based on Pima County multipliers, the spending of the tourists attending the youth baseball tournament games would generate 594 direct, indirect and induced jobs with \$16.5 million in wages and \$45.7 million in economic output. The spending of the White Sox spring training tourists, on the other hand, generates 142 jobs (annualized) with \$3.8 million in wages and over \$10.3 million in economic output.



Fiscal Impact on Pima County

- At stabilization (expected by the third year of operations - 2011), Pima County would collect \$871,900 each year thereafter (in 2008 dollars) from the tourists attending and participating in the Youth Baseball Tournament Facility. This figure assumes that 99,240 tourists would spend \$27.6 million each year, generating direct Regional Transportation Authority (RTA) excise taxes of \$129,400, bed taxes for Pima County of \$190,200 and rental car surcharge collections of \$66,300. Secondary revenues would total \$485,970 annually.
- In comparison, the 17,811 unique visitors to Pima County for the Chicago White Sox spring training games generate an estimated \$188,800 in revenues annually. This represents direct primary revenues of \$26,600 in RTA excise tax collections, \$36,100 in bed tax collections and \$12,800 in rental car surcharges. In addition, the secondary impacts from employees generated by tourist spending are estimated at about \$113,250 each year.
- The total impact over four years through the end of the White Sox contract is greater from the visitors generated by the Baseball Tournament Facility than from the tourism revenues generated by the Chicago White Sox visitors. The visitors to the Baseball Tournament Facility would generate nearly \$3.1 million to Pima County over the four year impact period while the spring training visitors would generate \$755,000 over the same time period. Overall, the impact to Pima County from the Baseball Tournament Facility is over \$2.3 million greater over four years than the impact from the Chicago White Sox spring training visitors. The table on the following page displays the comparison over this time period.



Tourism Impact Summary Impact on Pima County Baseball Tournament Facility compared to White Sox Departure (2008 Dollars)					
Baseball Tournament Facility	Stabilized^{2/}				
	2009	2010	2011	2012	4-Year Total
<u>Economic Impact</u>					
Jobs	397	506	594	594	
Wages	\$11,019,000	\$14,039,000	\$16,484,000	\$16,484,000	\$58,026,000
Economic output	\$30,552,000	\$38,927,000	\$45,702,000	\$45,702,000	\$160,883,000
<u>Fiscal Impact</u>					
Direct RTA excise tax	\$86,500	\$110,200	\$129,400	\$129,400	\$455,500
Direct bed tax	\$127,100	\$162,000	\$190,200	\$190,200	\$669,500
Direct rental car surcharge	\$45,200	\$56,400	\$66,300	\$66,300	\$234,200
Secondary revenues from employment	\$325,250	\$413,980	\$485,970	\$485,970	\$1,711,170
Total fiscal impact^{1/}	\$584,050	\$742,580	\$871,870	\$871,870	\$3,070,370
Chicago White Sox					
	2009	2010	2011	2012	4-Year Total
<u>Economic Impact</u>					
Jobs	142	142	142	142	
Wages	\$3,764,000	\$3,764,000	\$3,764,000	\$3,764,000	\$15,056,000
Economic output	\$10,330,000	\$10,330,000	\$10,330,000	\$10,330,000	\$41,320,000
<u>Fiscal Impact</u>					
Direct RTA excise tax	\$26,600	\$26,600	\$26,600	\$26,600	\$106,400
Direct bed tax	\$36,100	\$36,100	\$36,100	\$36,100	\$144,400
Direct rental car surcharge	\$12,800	\$12,800	\$12,800	\$12,800	\$51,200
Secondary revenues from employment	\$113,250	\$113,250	\$113,250	\$113,250	\$453,000
Total fiscal impact^{1/}	\$188,750	\$188,750	\$188,750	\$188,750	\$755,000
Baseball Tournament Facility less White Sox Visitors					
Net revenue difference	\$395,300	\$553,830	\$683,120	\$683,120	\$2,315,370
<p>^{1/} The total may not equal the sum of the impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures. All of the above figures are representative of the major revenue sources for the county. The figures are intended only as a general guideline as to how the county could be impacted by the project. The above figures are based on the current economic structure and tax rates of the county.</p> <p>^{2/} This is the anticipated stabilized revenue that would occur each year hereafter while the youth tournament league is in operation.</p> <p>Source: Elliott D. Pollack & Company; IMPLAN; Arizona Department of Revenue; Arizona Tax Research Association</p>					

Fiscal Impact on Local Municipalities

- Local municipalities (predominantly the City of Tucson) are estimated to receive nearly \$1.1 million annually from the Youth Tournament League at stabilization. In comparison, the spending of White Sox spring training visitors are estimated to equate to \$209,300 each year in tax revenues to local communities.
- Under the same four-year timeframe (2009 – 2012), the Baseball Tournament Facility would produce nearly \$3.8 million for local communities while White Sox spring training would bring in \$837,200, a difference of over \$2.9 million in favor of the Baseball Tournament Facility.



Fiscal Impact on the State of Arizona

- The State of Arizona is expected to receive nearly \$ 1.7 million in revenues each year at stabilization of the Baseball Tournament Facility. The State receives approximately \$373,100 each spring training season from Chicago White Sox visitor spending, and would continue to do so should the team move operations to Glendale.

- The Baseball Tournament Facility would bring in over \$4.4 million more in tax dollars over the next four years to the State of Arizona than the White Sox remaining through the 2012 season. In addition, the State would benefit from both the Baseball Tournament Facility and the continued revenue associated with visitors supporting the Chicago White Sox spring training games if the team relocated to Glendale, as both would still be within the State's taxing jurisdiction.



1.0 Introduction

Elliott D. Pollack & Company was retained by Pima County to conduct an economic and fiscal impact analysis of the proposed Baseball Tournament Facility and compare the results to the departure of the Chicago White Sox spring training in Pima County, Arizona. The analysis was designed to estimate the impact that visitors have on the economy as well as on governmental revenues that are generated from tourist spending. For additional perspective, these impacts have also been estimated for local communities (represented by the City of Tucson) and the State of Arizona.

Economic impact analysis examines the regional implications of an activity in terms of three basic measures: output, earnings and job creation. Fiscal impact analysis, on the other hand, evaluates the public revenues and costs created by a particular activity. In fiscal impact analysis, the primary revenue sources of a city, county or state government are analyzed to determine how the activity may financially affect them.

During the month of March of each year, spring training for the Arizona Diamondbacks, the Colorado Rockies and the Chicago White Sox has a significant impact on Pima County's economy. In 2006, the White Sox announced plans to relocate to Glendale, Arizona as early as the 2009 season. Their current lease runs through the 2012 spring training season in Pima County. This prompted the White Sox to seek an alternative use for the leased portion of the Kino Sports Complex in Pima County after their departure. The proposed alternative use includes a world class youth baseball facility including an expansion of the current practice fields south of Ajo Way. The new facility, operated by the Chicago White Sox, would be home to the proposed "Baseball Tournament Facility" as well as host a year-round youth league. The goal is to create a tournament facility comparable to the finest facilities in the country.

The new tournament facility is expected to be a travel baseball destination for youth leagues across America, generating year-round tourism for Pima County. The spending of non-local visitors in the economy would be considered a net new impact. Under this assumption, the direct spending of tourists are monies that would not otherwise be spent in the State of Arizona or Pima County.

This study quantifies the impact of the non-local visitors (i.e. tourism spending impact) on Pima County from the new proposed tournament facility and compares it to the forgone revenues that would be lost absent the Chicago White Sox spring training activity. The report does not estimate the impact of the improvements to the facility that are expected to cost approximately \$2.6 million. In addition, current Pima County absorbed expenses related to (a) the year round operation of the portion of the Kino Facility converted to the Tournament Facility and (b) the White Sox spring training would be greatly reduced. Such savings to Pima County have not been quantified in this report.

Also, there are additional economic consequences that this study does not attempt to quantify. First, with the departure of the White Sox, there would likely be lost marketing



value nationwide for Pima County from the exposure that comes from spring training. Conversely, the new year-round tournament facility would bring new marketing benefits to Pima County. Similarly, the recent trend of major league baseball teams relocating spring training sites creates significant challenges for Pima County. The Arizona Diamondbacks and the Colorado Rockies have voiced concerns of the need for at least three MLB professional baseball teams during spring training. This study does not address these types of issues related to synergy between the current trio of teams. The White Sox departure illustrates the potential complexities that the County faces in its future discussions with the Diamondbacks and Rockies as well as other Major League Baseball teams.

Qualifying Conditions

This study prepared by Elliott D. Pollack & Company is subject to the following considerations and limiting conditions.

- This study is intended to be read and used as a whole and not in parts.
- In conducting the analysis, Elliott D. Pollack & Company relied on the results and assumptions provided in a number of existing studies conducted by other firms on the impact of the amateur sports and the impact of the White Sox departure from Pima County. No surveys were conducted by this firm. In addition, Elliott D. Pollack & Company has relied on the results and assumptions provided by the Chicago White Sox regarding the Baseball Tournament Facility and has not conducted any research on the feasibility of its operations. An independent market feasibility summary of findings prepared by the Chicago White Sox is provided as an appendix at the end of this report.
- It is our understanding that this study is for the client's due diligence and other planning purposes. Neither our report, nor its contents, nor any of our work were intended to be included and, therefore, may not be referred to or quoted in whole or in part, in any registration statement, prospectus, public filing, private offering memorandum, or loan agreement without our prior written approval.
- The reported results represent the considered judgment of Elliott D. Pollack & Company based on the facts, analyses and methodologies described in the report.
- Except as specifically stated to the contrary, this study does not give consideration to the following matters to the extent they exist: (i) matters of a legal nature, including issues of legal title and compliance with federal, state and local laws and ordinances; and (ii) environmental and engineering issues, and the costs associated with their correction. The user of this study will be responsible for making his/her own determination about the impact, if any, of these matters.



- This analysis does not consider the costs to the Pima County associated with providing services during the event(s). Such analysis is beyond the scope of this study. In addition, the analysis is based on the current tax structure and rates imposed by the County and/or State legislature. Changes in those rates would alter the findings of this study.
- All dollar amounts are stated in constant 2008 dollars and, unless indicated, do not take into account the effects of inflation.
- We do not represent our results as results that will be achieved. Some assumptions inevitably will not materialize and unanticipated events and circumstances may occur; therefore, the actual results achieved may vary materially from the forecasted results.



2.0 Visitor & Spending Assumptions

The majority of the impact surrounding spring training or youth league tournaments is generated by the visitors that come to the area and spend their disposable income on local goods and services. Estimates for this spending are provided in subsequent tables. In addition, assumptions for fee revenues important for the operations of the proposed Baseball Tournament Facility are provided.

2.1 Data Sources

The assumptions for the evaluation of the tourism impact on Pima County were provided by a number of sources. Elliott D. Pollack & company relied on the results and assumptions provided in a number of existing studies conducted by other firms. No surveys were conducted by this firm.

The concept of the Baseball Tournament Facility was developed and described by the Chicago White Sox. It is our understanding that the Facility is being proposed by the Chicago White Sox as an alternative use for the property upon their departure from Tucson Electric Park. The data provided for the analysis included projected operating revenues as well as the number of planned tournaments and accompanying non-local visitors. This data was used, in conjunction with existing studies such as the “Amateur Sports Event Economic Impact Survey” by FMR Associates and commissioned by the Metropolitan Tucson Convention and Visitors Bureau (MTCVB), to estimate the total tourism spending impact of the Baseball Tournament Facility.

Tourism spending estimates for the White Sox departure were based on the March 2007 study “Supplemental Analysis for White Sox Departure Impact” along with the March 2007 “Cactus League Attendee Tracking Survey”. These reports were also produced by FMR Associates but commissioned by the Arizona Cactus League Baseball Association and the Arizona Office of Tourism.

2.2 Tournament Facility Project Description

The goal of the Chicago White Sox is to open a world class youth baseball tournament facility that would become a baseball travel destination for the southwest United States. The proposed tournament facility includes fields at the Kino Sports Complex primarily located on the fields south of Ajo Way. The maps on the following pages first illustrate the current layout of the complex as well as two potential layouts for the complex to be utilized for youth baseball. The design would require modifications to the existing fields such as pitching and base path distance, fences, modified lighting, and the creation of new fields and amenities to create a youth league baseball tournament facility. All fields would be lighted to youth baseball standards. Fields would be equipped with a scoreboard and bleachers. Washrooms and concession and novelty stands would be added. All improvements to the facility (totaling approximately \$2.6 million) are expected to be paid by the White Sox organization. In addition, maintenance of the tournament fields would no longer be the responsibility of Pima County.









The facility would appear to meet a major need for the community. “According to the Pima County Parks and Natural Resources, the national average for communities is to have 10 acres of parks for every 1,000 people. Pima County lags behind with barely 2 acres per 1,000 persons. The city of Tucson averages about 6 acres per 1,000 persons.¹” (Maben, 2008). In addition, the new facility would encourage more kids to become involved in the game. Recent studies have concluded that, “Other things being equal, if a kid plays sports, he will earn more money, stay in school longer, and be more engaged in civic life.²”(Hassett, 2008). The mix of local league games which would serve the residents of Pima County and tournament games that would bring visitors from throughout the country would benefit Pima County both economically and socially.

2.2.1 Fees and Gate Admission Assumptions

Table 1 provides information on the planned program fees. The facility would host both league and tournament play. The leagues would be played annually over four seasons with an estimated 85 teams playing 25 games per season at stabilization (2011). The fee per team would be \$70 per game, for a total annual collection of \$595,000. An estimated 40 two-day and 7 three-day tournaments would be hosted throughout the year with tournament fees of \$400 per team. This per team fee is considered conservative when compared to typical tournament fees charged throughout the country and would generate annual fee revenues of \$902,400.

The following program revenue estimates are provided as a guideline to the proposed facility operations once the facility is operating at full capacity (estimated for 2011). It is our understanding that the fees described in Table 1 and 2 would not generate revenues for Pima County. However, the impact on Pima County will be provided on subsequent tables in terms of the impact from tourists visiting the facility to participate in tournaments.

Elliott D. Pollack & Company has relied on the number of planned tournaments and accompanying visitors provided by the Chicago White Sox. This data was used, in conjunction with existing studies such as the “Amateur Sports Event Economic Impact Survey” by FMR Associates and commissioned by the Metropolitan Tucson Convention and Visitors Bureau (MTCVB), to estimate the total tourism spending impact of the Baseball Tournament Facility. Elliott D. Pollack & Company has not projected the feasibility of the Tournament Facility operations. An independent market feasibility summary of findings from the Chicago White Sox is provided as an appendix at the end of this report.

The results of the tourism impact of this report are based the assumption that there would be 40 two-day tournaments and 7 three-day tournaments and that the other program assumptions would be realized in full.

¹ Maben, S. (2008, April 22). Turn Rillito into a soccer complex. *Arizona Daily Star* , p. 1.

² Hassett, S. G. (2008, May/June). *Little League, Huge Effect*. Retrieved from The American: <http://american.com/archive/2008/may-june-magazine-contents/little-league-huge-effect/?searchterm=little%20league>



Table 1 Baseball Tournament Facility Program Fees	
<u>Leagues</u>	
Number of seasons (per year)	4
Average teams per season	85
Games per season	25
Total games	4,250
Fee per team per game	\$70
Annual fees collected from league play	\$595,000
<u>Tournaments</u>	
Number of 2-day tournaments	40
Number of 3-day tournaments	7
Tournament days per year	101
Teams per tournament	48
Tournament fee per team	\$400
Total annual tournament fees	\$902,400
NOTE: Figures at stabilization, expected for 2011.	
Source: Chicago White Sox	

Gate admission would be charged for tournaments only. While the admittance fees are projected at \$3.00 and \$5.00 for two-day and three-day tournaments, respectively, teams often stay on premises between games and, therefore, would only collect an average of \$1.50 and \$4.00 per game, respectively. In addition, only non-participants pay gate admission. For two-day tournaments, it is assumed that 55 non participants attend each game and 75 non participants attend each three-day tournament. The higher attendance for the three-day tournaments is anticipated due to the typical higher profile status of these games. Overall, total gate admission is projected to be \$464,000 annually once the facility reaches stabilized operations.



Table 2

**Baseball Tournament Facility
Gate Admission (Tournaments only)**

Admission fee two day tournament	\$3.00
Admission fee three day tournament	\$5.00
Projected average collection per non-participant:	
2-day tournaments	\$1.50
3-day tournaments	\$4.00
Number of non-participants:	
2-day tournaments	55
3-day tournaments	75
Number of games:	
2-day tournaments	2,880
3-day tournaments	756
Gate admission collection	
2-day tournaments	\$237,600
3-day tournaments	\$226,800
Total gate admission	\$464,400
NOTE: Figures at stabilization, expected for 2011.	
Source: Chicago White Sox	

2.2.2 Facility Operations

The Baseball Tournament Facility would be operated and funded by the Chicago White Sox Organization. Operating expenses that are currently being absorbed by Pima County related to the year round operation of the portion of the Kino Facility converted to the Tournament Facility and the White Sox spring training would be greatly reduced. Such savings have not been quantified in this report.

As described above, initial improvements to the complex are expected to cost approximately \$2.6 million. Once completed, the facility is expected to employ 5 full-time staff. On game days, an average of 28.7 facility staff would be on site along with 2 umpires per game and 1 score keeper per game. In order to avoid double counting, the economic and fiscal impacts of the facility operations are not explicitly described in this report. That is, the operations of the facility are already accounted for in the multiplier ripple effect of tourist spending at the Baseball Tournament Facility (see Table 7). For a further description of multiplier impacts, see Section 3.1 of this report.

2.2.3 Facility Use & Participation

Table 3 describes the projected facility use from 2009 through stabilization in year 2011. The number of potential games throughout any year is 9,984. However, in order to be conservative, the Chicago White Sox estimated an initial 42% unused capacity in 2009, 27% after one full year of operations and a total of 15% at stabilized operations. An additional 6% of the potential games were assumed to be closed or rained out. By 2011,



the total number of games played is estimated at 7,886. League play would make up 4,250 of these games and the remaining 3,636 games would be played in tournaments.

Annual attendance (including players and coaches) is projected to be 276,250 for leagues and 324,100 for tournaments at stabilized operations. In total, attendance is estimated to be 600,430 annually at the proposed Baseball Tournament Facility.

Table 3
**Baseball Tournament Facility
Facility Use & Participation**

	<u>2009</u>	<u>2010</u>	<u>2011 & Thereafter</u>
Number of potential games	9,984	9,984	9,984
Number of Games			
Leagues	2,800	3,600	4,250
Tournaments	2,448	3,096	3,636
	5,248	6,696	7,886
Inventory used as a percentage of capacity:			
2 day tournaments	20%	25%	29%
3 day tournaments	4%	6%	8%
League Use	28%	36%	43%
Dates Closed or rain days	6%	6%	6%
Unused or unallocated inventory	42%	27%	15%
	100%	100%	100%
In house attendance (w/ players & coaches) all games			
Leagues	182,000	234,000	276,250
Tournaments	216,720	276,210	324,180
	398,720	510,210	600,430

Source: Chicago White Sox

2.3 Baseball Tournament Facility Visitor & Spending Assumptions

The following tables outline the annual visitor estimates along with the projected spending of the non-local tourists used in this report to estimate the economic and fiscal impact on Pima County.

2.3.1 Baseball Tournament Facility Visitor Assumptions

This report estimates the net new impact on Pima County of tourist spending. Thus, the assumptions for visitors from outside Pima County are generated by tournament play only. This is because the leagues are anticipated to host local teams that would spend their incomes in Pima County with or without the Baseball Tournament Facility.

Table 4 outlines the projected non-local visitor assumptions during the stabilization period through 2011. Once the facility is operating at its full potential, a projected 40 two-day



tournaments and 7 three-day tournaments would host 48 teams per tournament, with total attendance of 42.5 people per team for two-day tournaments and 52.5 people per team for three-day tournaments. Overall, the total number of attendees projected at the tournaments (including players and coaches) is expected to be 99,240 per year at stabilization. However, an estimated 20% are projected to come from within Pima County, which means that 79,392 would require hotel accommodations. An additional 20% are expected to drive in and, thus, not need a rental car.

Table 4
**Baseball Tournament Facility
Visitor Assumptions**

	2009			2010			2011 & Thereafter		
	2-day	3-day	Total	2-day	3-day	Total	2-day	3-day	Total
Number of Tournaments	28	4		34	6		40	7	
Teams per Tournament	48	48		48	48		48	48	
VISITORS									
Players per Team	12	12		12	12		12	12	
Coaches per Team	3	3		3	3		3	3	
Other Attendees per team	27.5	37.5		27.5	37.5		27.5	37.5	
Players per year	16,128	2,304	18,432	19,584	3,456	23,040	23,040	4,032	27,072
Coaches per year	4,032	576	4,608	4,896	864	5,760	5,760	1,008	6,768
Other attendees per year	36,960	7,200	44,160	44,880	10,800	55,680	52,800	12,600	65,400
Total attendees per year	57,120	10,080	67,200	69,360	15,120	84,480	81,600	17,640	99,240
Estimated percentage drive-in or local	40%	40%	40%	40%	40%	40%	40%	40%	40%
Percentage that need rental car	60%	60%	60%	60%	60%	60%	60%	60%	60%
Number of people needing rental car	34,272	6,048	40,320	41,616	9,072	50,688	48,960	10,584	59,544
Estimated percentage hotel guests	80%	80%	80%	80%	80%	80%	80%	80%	80%
Unique hotel guests	45,696	8,064	53,760	55,488	12,096	67,584	65,280	14,112	79,392

Source: Chicago White Sox

2.3.2 Baseball Tournament Facility Visitor Spending Assumptions

According to a study conducted by FMR Associates on economic impacts of amateur sports in Tucson, the typical team sport visitor spends an average of \$110 per day. The total spending is broken into the categories of food & beverage, lodging, entertainment, transportation, and team related spending. After accounting for length of stay (2.9 days for 2-day tournaments and 4.35 days for 3-day tournaments) along with the percentage of visitors that are from outside Pima County, total spending is estimated to be \$18.4 million in 2009, \$23.5 million in 2010 and \$27.6 million annually starting in 2011 (see Table 5).



Table 5
**Baseball Tournament Facility
Visitor Assumptions**

	2009			2010			2011 & Thereafter		
	<u>2-day</u>	<u>3-day</u>	<u>Total</u>	<u>2-day</u>	<u>3-day</u>	<u>Total</u>	<u>2-day</u>	<u>3-day</u>	<u>Total</u>
Total attendees per year	57,120	10,080	67,200	69,360	15,120	84,480	81,600	17,640	99,240
Requiring rental car	34,272	6,048	40,320	41,616	9,072	50,688	48,960	10,584	59,544
Unique hotel guests	45,696	8,064	53,760	55,488	12,096	67,584	65,280	14,112	79,392
Daily spending per person	\$110	\$110		\$110	\$110		\$110	\$110	
Number of days	2.9	4.35		2.9	4.35		2.9	4.35	
Food & Beverage	25.7%	25.7%	25.7%	25.7%	25.7%	25.7%	25.7%	25.7%	25.7%
Lodging	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%	46.0%
Entertainment	12.7%	12.7%	12.7%	12.7%	12.7%	12.7%	12.7%	12.7%	12.7%
Transportation	10.7%	10.7%	10.7%	10.7%	10.7%	10.7%	10.7%	10.7%	10.7%
Team related spending	4.9%	4.9%	4.9%	4.9%	4.9%	4.9%	4.9%	4.9%	4.9%
Food & Beverage	\$3,747,985	\$992,114	\$4,740,099	\$4,551,125	\$1,488,171	\$6,039,295	\$5,354,264	\$1,736,199	\$7,090,463
Lodging	\$6,701,727	\$1,773,986	\$8,475,713	\$8,137,811	\$2,660,980	\$10,798,791	\$9,573,895	\$3,104,476	\$12,678,371
Entertainment	\$1,848,084	\$489,199	\$2,337,283	\$2,244,102	\$733,798	\$2,977,901	\$2,640,120	\$856,098	\$3,496,218
Transportation	\$1,559,785	\$412,884	\$1,972,670	\$1,894,025	\$619,327	\$2,513,352	\$2,228,265	\$722,548	\$2,950,812
Team related spending	\$719,443	\$190,441	\$909,884	\$873,609	\$285,661	\$1,159,270	\$1,027,776	\$333,271	\$1,361,047
Total visitor spending	\$14,577,024	\$3,858,624	\$18,435,648	\$17,700,672	\$5,787,936	\$23,488,608	\$20,824,320	\$6,752,592	\$27,576,912

Source: Chicago White Sox; Amateur Sports Event Economic Impact Survey, FMR Associates

2.4 Chicago White Sox Visitor & Spending Assumptions

Assumptions for the non-local visitors attending Chicago White Sox spring training games were extrapolated from the March 2007 study, "Supplemental Analysis for White Sox Departure Impact" as well as the March 2007 "Cactus League Attendee Tracking Survey". While total attendance in 2007 was 86,397, only 50.3%, or 43,458 attendees were from out-of-town. Each person attended an average of 2.44 games, making the number of unique travelers just over 17,800. Spending per person per day was approximately \$109.36 and the median length of stay was 3.2 days. In total, non-local visitors in town for the Chicago White Sox spring training games spent over \$6.2 million.

Similar to the spending impact from the tourists projected to attend Baseball Tournament Facility tournament games, the spring training visitor spending is broken down into categories in order to estimate the economic and fiscal impact.



Table 6 Chicago White Sox Visitor & Spending Assumptions	
Total home game attendance (2007)	86,397
Percent out-of-town	50.3%
Total out-of-town attendance	43,458
Number of games attended	2.44
Total unique travelers	17,811
Spending per person per day	\$109.36
Average length of stay (days)	3.2
Total spending	\$6,232,825
Game spending	20.5%
Lodging	27.6%
Food & Beverage	27.8%
Entertainment	5.8%
In-town transportation	13.7%
Retail	3.7%
Other	0.9%
Game spending	\$1,276,365
Lodging	\$1,718,802
Food & Beverage	\$1,731,973
Entertainment	\$363,236
In-town transportation	\$856,523
Retail	\$231,053
Other	\$54,871
Total	\$6,232,825
Source: Supplemental Analysis for White Sox Departure Impact (March, 2007); Cactus League Attendee Tracking Survey (March 2007)	



3.0 Economic Impact Analysis

3.1 Economic Impact Methodology

Economic impact analysis examines the economic implications of an activity in terms of output, earnings, and employment. For this study, the analysis focuses on the economic impact of tourist spending throughout the year from tournaments at the Baseball Tournament Facility and compares the results to the tourist spending of visitors to the Chicago White Sox spring training games.

Economists have developed multipliers to estimate the ripple effect that this spending would generate throughout the economy. The different types of multipliers are known as direct, indirect, and induced, according to the manner in which the impacts are generated. For instance, **direct** output is generated by the direct spending of the tourists in the local economy. **Indirect** output is generated by the businesses that provide goods and services essential to the operation of tourism industry establishments. These businesses range from manufacturers (who make goods) to wholesalers (who deliver goods) to janitorial firms who clean the buildings. Finally, the spending of the wages and salaries of the direct and indirect employees on items such as food, housing, transportation and medical services creates **induced** output in all sectors of the economy.

The tourism multipliers used in the report are related to the spending categories. Direct spending on transportation, retail, restaurants & bars, hotels, and entertainment is run through the corresponding multiplier set for that category. The Minnesota IMPLAN Group developed the Pima County multipliers used in this study. The economic impact is categorized into three types of impacts:

- (1) **Employment Impact** – the total “wage and salary” and self employed jobs in a region. Jobs include both part time and full time workers.
- (2) **Earnings Impact** – the personal income, earnings or wages, of the direct, indirect and induced employees. Earnings include total wage and salary payments as well as benefits of health and life insurance, retirement payments and any other non-cash compensation.
- (3) **Economic Output** – the economic output, also referred to as economic activity, relates to the gross receipts for goods or services generated by the company’s operations.

Economic impacts are by their nature regional in character. People working in the industries that serve tourist related spending would commute to work from their homes in all parts of the County. Therefore, the economic impact of the tourism is expressed in this report as a countywide (Pima County) benefit. All dollar figures, unless otherwise stated, are expressed in 2008 dollars.



3.2 Economic Impact of Tourism

Table 7 provides the annual economic impact generated by the spending of non-local visitors during tournament play at the Baseball Tournament Facility and compares the results to the spending of non-local Chicago White Sox spring training visitors. The impact of the tournament facility is shown for the two years leading up to stabilization and the first stabilized year (2011).

The projected tournament play at stabilization would attract 99,240 visitors throughout the year and generate \$27.6 million in spending (see Table 5). The spring training, on the other hand, takes place during only one month of the year (March) and draws an estimated 17,811 unique, non-local visitors that spend \$6.2 million in the local economy. Thus, clearly the larger economic impact on Pima County would occur with the Baseball Tournament Facility. However, this report does not attempt to measure the additional economic consequences from the departure of the Chicago White Sox such as lost marketing value or the potential loss of other spring training teams in the future.

The direct spending by tournament attendees would generate a total of 397 jobs (direct, indirect and induced) with \$11.0 million in wages in its first year of operations (2009). The ripple effect of the direct spending (\$18.4 million) would generate an additional \$12.1 million in indirect and induced economic activity, for a total of \$30.6 million in total economic output. By 2010, the tournament facility would generate demand for 506 jobs with \$14.0 million in wages and \$38.9 million in economic output. At stabilization (2011 and thereafter), the tournament facility would generate demand in the tourism and related industries for 594 jobs with \$16.5 million in wages and \$45.7 million in economic output.

In comparison, the \$6.2 million in direct spending of Chicago White Sox non-local visitors would generate a total of 142 annualized jobs with wages of \$3.8 million. The ripple effect of the direct spending (\$6.2 million) throughout the economy generates a total economic output of \$10.3 million.



Table 7			
Annual Economic Impact from Tourism Pima County (2008 Dollars)			
Tournament Facility Visitors			
2009			
Impact Type	Jobs	Wages	Economic Output
Direct	281	\$6,514,000	\$18,436,000
Indirect	49	\$1,922,000	\$5,543,000
Induced	67	\$2,583,000	\$6,573,000
Total	397	\$11,019,000	\$30,552,000
2010			
Impact Type	Jobs	Wages	Economic Output
Direct	358	\$8,299,000	\$23,489,000
Indirect	62	\$2,449,000	\$7,063,000
Induced	85	\$3,291,000	\$8,375,000
Total	506	\$14,039,000	\$38,927,000
2011 & Thereafter			
Impact Type	Jobs	Wages	Economic Output
Direct	421	\$9,744,000	\$27,577,000
Indirect	73	\$2,875,000	\$8,292,000
Induced	100	\$3,865,000	\$9,833,000
Total	594	\$16,484,000	\$45,702,000
White Sox Spring Training Visitors (annualized)			
Impact Type	Jobs	Wages	Economic Output
Direct	103	\$2,247,000	\$6,233,000
Indirect	16	\$636,000	\$1,853,000
Induced	23	\$881,000	\$2,244,000
Total	142	\$3,764,000	\$10,330,000
<small>1/ The total may not equal the sum of the impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures Source: Elliott D. Pollack & Company; IMPLAN</small>			



4.0 Fiscal Impact Analysis

Fiscal impact analysis studies the public revenues associated with a particular economic activity. The primary revenue sources of local, county, and state governments (i.e., taxes) are analyzed to determine how an activity may affect the various jurisdictions. This section will evaluate the impact of tourism on Pima County, local municipalities (predominantly the City of Tucson) and the State of Arizona.

4.1 Fiscal Impact Methodology

The fiscal impact figures cited in this report have been generated from information provided by a variety of sources including the Internal Revenue Service; Arizona Department of Revenue; Pima County; and the Arizona Tax Research Association. Elliott D. Pollack and Company has relied upon the estimates of tourism spending outlined in Section 2 of this study. The direct “primary” revenues collected will be generated from spending on rental cars, retail, restaurants, hotels and entertainment.

In addition to the above revenues, the employees generated from tourist spending would spend part of their salaries on local goods and services and pay taxes on the homes they occupy. These employees would also contribute to revenues collected by the State and that are ultimately shared with local counties and cities. The revenues are similarly referred to in this report as “secondary” impacts.

Following is a description of the applicable tax revenue sources of the various jurisdictions that will be considered for this analysis.

- Transaction Privilege Tax (Sales Tax)
The State, Regional Transportation Authority (RTA), and local cities charge transaction privilege (sales) tax on retail goods and services. The sales tax rate for the State is 5.6%, which includes a 5.0% tax (a portion of which is shared with counties and cities) and 0.6% that is not shared. The RTA levies a 0.5% transportation excise tax on goods and services transactions dedicated to the transportation fund. Other jurisdictions such as the City of Tucson also benefit from this revenue source, and so the benefit to Pima County under this category may be overstated. The City of Tucson’s TPT rate is 2.0%. These tax rates are applied to the estimated taxable spending of the visitors attending tournaments or spring training, including the rentals of tangible property (i.e. rental cars).

A portion of the State’s collections are shared with county and city governments based on a formula that considers both point of sale and population.

- Bed Tax
The State of Arizona imposes a bed tax on hotel rooms of 5.5%. A portion of the State’s bed tax collections are shared with county and city governments based on a formula that considers both point of sale and population.



Pima County levies a transient lodging tax of 6.0%. This tax is levied on all hotels located in unincorporated areas of the County. The revenue collections from the Pima County bed tax are appropriated to the Tourism Fund (50%), Stadium District (34%) and Economic Development Fund (16%). The RTA levies a 0.55% tax on lodging.

The City of Tucson levies a 6.0% transient lodging tax on hotels located within City of Tucson limits. The City also levies an additional one dollar per day surtax applied to each occupied room.

Bed Tax Rates						
Community	County	Bed	City	RTA	State	Total
Tucson	Pima	6.00% +\$1 ^{1/}	0.00%	0.55%	5.50%	12.05% +\$1
Unincorporated	Pima	6.00%	0.00%	0.55%	5.50%	12.05%

^{1/} City of Tucson charges a surtax of \$1 per day per occupied room.

This report estimates Pima County collections from bed tax in the unincorporated hotels only. According to Pima County, currently the total revenue collection for incorporated areas versus unincorporated areas is about a 60/40 split. However, because Tucson Electric Park (and thus, spring training and the tournament facility) is within the City of Tucson limits, it is likely that more visitors will stay within city limits than normal. Thus, for the purpose of this report, it is assumed that only 25% of the visitors are generating bed tax revenues for Pima County. For simplicity, it is assumed that the remaining 75% would be captured by the City of Tucson, though it is possible that surrounding communities could capture a portion of the lodging revenue.

- **Rental Car Surcharge**
Pima County is authorized by the State to collect up to \$3.50 per rental car contract. For this analysis, only the persons that are not from Tucson, or are not expected to drive in from other cities are included in the estimates for rental car tax collections.
- **Property Tax**
Direct, indirect and induced employees supported by the tourism would pay county and city property taxes on homes they occupy. Pima County levies a combined primary and secondary property tax rate of 4.6291 per \$100 of assessed value. This excludes all other taxing districts. The City of Tucson's most current combined primary and secondary rate is 0.9601 per \$100 of assessed value. In order to estimate property taxes, the value of a typical housing unit in Pima County is estimated at \$200,000 including both single family homes and apartment units. This value assumes that employees would occupy units in a pattern similar to the current inventory of housing in the County.



- State Shared Revenues

Each county, city and town in Arizona receives a portion of State revenues from four different sources - State sales tax, State income tax (cities and towns only), vehicle license tax and highway user tax. The formulas for allocating these revenues are primarily based on population. The model calculates total collections, estimates total distributions and allocates the share projected for Pima County and the City of Tucson. State revenues net out these revenues and so reflect only the revenues that are not redistributed.

- State Income Tax

The State of Arizona collects taxes on personal income. The tax rate used in the analysis averages about 1.6% for earnings. These percentages are based on the most recently available income tax data from the State and the projected wage levels of jobs created by the construction and operations impact. This tax is applied to the wages and earnings of direct, indirect and induced employment. Portions of this tax are redistributed through revenue sharing to cities and towns throughout Arizona based on population.

- State Unemployment Tax

Unemployment insurance tax for employees is 2.7% on the first \$7,000 of earned income. This factor is applied to the projected wages and earnings of direct, indirect and induced employees.

- HURF Taxes

The State of Arizona collects specific taxes for the Highway User Revenue Fund (HURF). Both registration fees and motor vehicle fuel tax (gas tax) are considered in this analysis. The motor vehicle fuel tax is \$0.18 per gallon and is calculated based on a vehicle traveling 12,000 miles per year at 15 miles per gallon. Registration fees average \$66 per employee in the State of Arizona. These factors are applied to the projected direct, indirect and induced employee count. Portions of these taxes are distributed to counties and cities throughout Arizona based on a formula that includes population and the origin of gasoline sales.

- Vehicle License Tax

The vehicle license tax is a personal property tax placed on vehicles at the time of annual registration. This factor is applied to the projected direct, indirect and induced employee count. The average tax used in this analysis is \$325 and portions of the total collections are distributed through the Highway User Revenue Fund. The remaining funds are shared between counties and cities in accordance with population based formulas.

The above tax categories represent the largest sources of revenues that will be generated for the State of Arizona, Pima County and the City of Tucson.



4.2 Fiscal Impact of Tourism

Tourism in Pima County generates direct fiscal impacts from rental car services, retail sales, and hotel room occupancy. In addition, secondary impacts are generated by employees who work in the tourism industry including employee spending (which generates sales taxes) and various other tax payments such as property taxes, income taxes, vehicle license taxes, unemployment taxes, and gasoline taxes.

In some of the various spending categories, only a percentage of total spending was used to derive the fiscal impacts (tax collections). The 'Food and Beverage' and 'Other' categories were taxed at 80% of total spending, 'Entertainment' spending was taxed at 75% of total, and 'Team Related' and 'Game' spending was taxed at 50% of their totals. This allows for spending on possible non-taxable items that could overstate the actual impact. It is assumed that all spending occurs within the City of Tucson, with the exception of 25% of lodging occurring in unincorporated Pima County.

Fiscal Impact of Tourism on Pima County

As outlined in Table 8a, as the Baseball Tournament Facility opens and begins operations in 2009 approximately \$584,100 would accrue to Pima County under the assumption that 67,200 tourists spend an estimated \$18.4 million in Pima County that year (see Table 5). This includes \$258,800 in primary revenues such as the \$86,500 in RTA excise tax collections from the 0.5% (0.55% for lodging) transportation excise tax, \$127,100 from the 25% of visitors expected to stay in unincorporated hotels and \$45,200 from the \$3.50 rental car surcharge levied per rental car. The remaining \$325,250 in projected impact would be generated by the employees who work in the tourism industry and the indirect and induced employees impacted by the ripple effects of the spending.

By 2010, the Baseball Tournament Facility would be operating at about 85% of projected stabilization with 84,880 tourists spending \$23.5 million. Thus, total revenues for Pima County that year are expected to be \$742,600. This includes \$110,200 in RTA excise tax, \$162,000 in direct bed tax and an estimated \$56,400 in rental car surcharge collections. The remaining \$413,980 is generated by the secondary impact of the employees.

At stabilization (expected by 2011 and thereafter), Pima County would collect \$871,900 each year thereafter (in 2008 dollars). This figure assumes that 99,240 tourists would spend \$27.6 million each year, generating RTA excise taxes of \$129,400, bed taxes for Pima County of \$190,200 and rental car surcharge collections of \$66,300. Additional secondary revenues would total \$485,970 annually.

In comparison, the 17,811 unique visitors to Pima County for the Chicago White Sox spring training games generate an estimated \$188,800 in revenues annually. This represents direct primary revenues of \$26,600 in RTA excise tax collections, \$36,100 in bed tax collections (at a 35% total visitor capture rate) and \$12,800 in rental car surcharge. In addition, the secondary impacts from the employees are estimated at about \$113,250 each year.



Table 8a

**Annual Fiscal Impact from Tourism
Pima County Revenues (Ongoing Annually)^{1/}
(2008 Dollars)**

Tournament Facility Visitors

2009

	Annual Primary Revenues			Annual Secondary Revenues from Employees				Total Annual Revenues
	RTA Excise Tax ^{2/}	Direct Bed Tax ^{3/}	Direct Rental Car Surcharge ^{4/}	Employee Spending RTA Excise Tax ^{2/}	Residential Property Tax ^{5/}	State Shared HURF ^{6/}	State Shared Sales Tax Revenues ^{7/}	
Direct	\$86,500	\$127,100	\$45,200	\$18,600	\$180,600	\$8,700	\$27,980	\$494,700
Indirect	N/A	N/A	N/A	\$4,000	\$31,300	\$1,510	\$840	\$37,700
Induced	N/A	N/A	N/A	\$5,400	\$43,100	\$2,080	\$1,140	\$51,700
Total	\$86,500	\$127,100	\$45,200	\$28,000	\$255,000	\$12,290	\$29,960	\$584,100

2010

	Annual Primary Revenues			Annual Secondary Revenues from Employees				Total Annual Revenues
	RTA Excise Tax ^{2/}	Direct Bed Tax ^{3/}	Direct Rental Car Surcharge ^{4/}	Employee Spending RTA Excise Tax ^{2/}	Residential Property Tax ^{5/}	State Shared HURF ^{6/}	State Shared Revenues ^{7/}	
Direct	\$110,200	\$162,000	\$56,400	\$23,700	\$230,100	\$10,770	\$35,640	\$628,800
Indirect	N/A	N/A	N/A	\$5,100	\$39,900	\$1,870	\$1,070	\$47,900
Induced	N/A	N/A	N/A	\$6,900	\$54,900	\$2,570	\$1,460	\$65,800
Total	\$110,200	\$162,000	\$56,400	\$35,700	\$324,900	\$15,210	\$38,170	\$742,600

2011 & Thereafter

	Annual Primary Revenues			Annual Secondary Revenues from Employees				Total Annual Revenues
	RTA Excise Tax ^{2/}	Direct Bed Tax ^{3/}	Direct Rental Car Surcharge ^{4/}	Employee Spending RTA Excise Tax ^{2/}	Residential Property Tax ^{5/}	State Shared HURF ^{6/}	State Shared Revenues ^{7/}	
Direct	\$129,400	\$190,200	\$66,300	\$27,800	\$270,200	\$12,640	\$41,850	\$738,400
Indirect	N/A	N/A	N/A	\$6,000	\$46,800	\$2,190	\$1,260	\$56,300
Induced	N/A	N/A	N/A	\$8,100	\$64,400	\$3,020	\$1,710	\$77,200
Total	\$129,400	\$190,200	\$66,300	\$41,900	\$381,400	\$17,850	\$44,820	\$871,900

White Sox Spring Training Visitors (2009-2012)

	Annual Primary Revenues			Annual Secondary Revenues from Employees				Total Annual Revenues
	RTA Excise Tax ^{2/}	Direct Bed Tax ^{3/}	Direct Rental Car Surcharge ^{4/}	Employee Spending RTA Excise Tax ^{2/}	Residential Property Tax ^{5/}	State Shared HURF ^{6/}	State Shared Revenues ^{7/}	
Direct	\$26,600	\$36,100	\$12,800	\$6,700	\$66,100	\$2,170	\$8,490	\$159,000
Indirect	N/A	N/A	N/A	\$1,300	\$10,400	\$340	\$280	\$12,300
Induced	N/A	N/A	N/A	\$1,900	\$14,700	\$480	\$390	\$17,500
Total	\$26,600	\$36,100	\$12,800	\$9,900	\$91,200	\$2,990	\$9,160	\$188,800

1/ The total may not equal the sum of the impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures. All of the above figures are representative of the major revenue sources for the county. The figures are intended only as a general guideline as to how the county could be impacted by the project. The above figures are based on the current economic structure and tax rates of the county.

2/ Tax receipts from out-of-area visitors and local employees under the countywide Regional Transportation Authority (RTA) excise tax. RTA Excise Tax revenues fund transportation-related projects for the cities & towns and unincorporated areas of Pima County. Although the County benefits from these transportation-related projects, only RTA has discretion in determining funded projects.

3/ Tax receipts from out-of-area visitors for the County's unincorporated area Transient Lodging tax, which are allocated to tourism promotion - 50% through the Metropolitan Tucson Convention & Visitors Bureau, 34% to the County's Stadium District and 16% to the Economic Development Fund. Assumes that the County would capture 25% of total Youth League hotel spending and 35% of total White Sox visitor hotel spending.

4/ For the tournament league, rental cars were estimated with a baseline of 40% in need of a rental car. Teams were assumed to travel together within two vehicles and the party size of other attendees was calculated as a ratio of total other attendees to players. For the White Sox impact, rental cars were based on the Cactus League Attendee Tracking Survey with approximately 36% of out-of-area White Sox attendees renting a car in 2007.

5/ County property taxes paid by local employees who own or rent property. Revenues only for Pima County primary and secondary taxes (including debt service and County's library and flood control districts). Does not include property taxes for cities and towns, community college, school districts or other special districts.

6/ HURF category includes only employee estimates of annual per person fuel taxes, vehicle registration fees, and vehicle license taxes that flow into the HURF.

7/ State-shared sales taxes received by Pima County for its General Fund. Does not include state-shared Highway User Revenue Funds or state-shared taxes received by cities and towns in Pima County.

Source: Elliott D. Pollack & Company; IMPLAN; Arizona Department of Revenue; Arizona Tax Research Association



Fiscal Impact of Tourism on City of Tucson

Much of the local impact from tourists is expected to occur within the City of Tucson. However, it is likely that spending could leak to surrounding communities. For simplicity, only the impact on City of Tucson is illustrated under the assumption that all taxable spending would or does occur within Tucson city limits. The reality is that the resulting figures for the City of Tucson will reflect the cumulative tax collections from all of the surrounding communities. The tax rates of the City of Tucson have also been used as a proxy for all of the communities.

As outlined in Table 8b, in 2009 approximately \$712,700 would accrue to the City of Tucson. This includes \$550,800 in primary revenues such as the \$155,500 in direct sales tax collections and \$395,300 from the 75% of visitors expected to stay in hotels within city limits. The remaining \$161,910 in projected impact would be generated by the employees who work in the tourism industry and the indirect and induced employees impacted by the ripple effects of the spending.

In 2010, total revenues for the City of Tucson are expected to be \$907,900. This includes \$198,100 in direct sales taxes and \$503,400 in direct bed taxes. The remaining \$206,440 is generated by the secondary impact of the employees who work in the tourism industry.

At stabilization (expected by 2011 and thereafter), the City of Tucson would collect nearly \$1.1 million each year (in 2008 dollars). This figure assumes that 99,240 tourists would spend \$27.6 million each year, generating direct sales taxes of \$232,600 and bed taxes of \$591,000. Additional secondary revenues would total \$242,450 annually.

In comparison, the 17,811 unique visitors to Pima County for the Chicago White Sox spring training games generate an estimated \$209,300 in revenues annually for the City of Tucson. This represents direct primary revenues of \$63,400 in sales tax collections and \$88,100 in bed tax collections. As mentioned previously, the expected capture rate of White Sox visitors to unincorporated county hotels and resorts (35%) is higher than the Youth League visitors (25%). In addition, the secondary impacts from the employees are estimated at about \$57,830 each year.



Table 8b

**Annual Fiscal Impact from Tourism
City of Tucson Revenues (Ongoing Annually)^{1/}
(2008 Dollars)**

Tournament Facility Visitors

2009

	Annual Primary Revenues		Annual Secondary Revenues from Employees				Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax & \$1 Surtax ^{2/}	Employees Sales Tax	Residential Property Tax ^{3/}	State Shared HURF ^{4/}	State Shared Revenues ^{5/}	
Direct	\$155,500	\$395,300	\$61,000	\$30,700	\$6,669	\$15,030	\$664,200
Indirect	N/A	N/A	\$13,100	\$5,300	\$1,156	\$960	\$20,500
Induced	N/A	N/A	\$17,800	\$7,300	\$1,591	\$1,300	\$28,000
Total	\$155,500	\$395,300	\$91,900	\$43,300	\$9,417	\$17,290	\$712,700

2010

	Annual Primary Revenues		Annual Secondary Revenues from Employees				Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax & \$1 Surtax ^{2/}	Employees Sales Tax	Residential Property Tax ^{3/}	State Shared HURF ^{4/}	State Shared Revenues ^{5/}	
Direct	\$198,100	\$503,400	\$77,700	\$39,200	\$8,497	\$19,150	\$846,000
Indirect	N/A	N/A	\$16,700	\$6,800	\$1,473	\$1,230	\$26,200
Induced	N/A	N/A	\$22,700	\$9,300	\$2,027	\$1,660	\$35,700
Total	\$198,100	\$503,400	\$117,100	\$55,300	\$11,998	\$22,040	\$907,900

2011 & Thereafter

	Annual Primary Revenues		Annual Secondary Revenues from Employees				Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax & \$1 Surtax ^{2/}	Employees Sales Tax	Residential Property Tax ^{3/}	State Shared HURF ^{4/}	State Shared Revenues ^{5/}	
Direct	\$232,600	\$591,000	\$91,200	\$46,000	\$9,976	\$22,480	\$993,300
Indirect	N/A	N/A	\$19,600	\$8,000	\$1,730	\$1,440	\$30,800
Induced	N/A	N/A	\$26,700	\$11,000	\$2,380	\$1,940	\$42,000
Total	\$232,600	\$591,000	\$137,500	\$65,000	\$14,086	\$25,860	\$1,066,100

White Sox Spring Training Visitors

	Annual Primary Revenues		Annual Secondary Revenues from Employees				Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax & \$1 Surtax ^{2/}	Employees Sales Tax	Residential Property Tax ^{3/}	State Shared HURF ^{4/}	State Shared Revenues ^{5/}	
Direct	\$63,400	\$88,100	\$21,900	\$11,200	\$2,440	\$5,900	\$192,900
Indirect	N/A	N/A	\$4,300	\$1,800	\$383	\$320	\$6,800
Induced	N/A	N/A	\$6,100	\$2,500	\$543	\$440	\$9,600
Total	\$63,400	\$88,100	\$32,300	\$15,500	\$3,365	\$6,660	\$209,300

1/ The total may not equal the sum of the impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures. All of the above figures are representative of the major revenue sources for the city.

2/ Assumes that the City of Tucson would capture 75% of total Youth League hotel spending and 65% of total White Sox visitor hotel spending. Room nights for teams are estimated at four persons per room while attendees is based on average party size.

3/ City property taxes paid by local employees who own or rent property. Revenues only for City of Tucson primary and secondary taxes. Does not include property taxes for county, community college, school districts or other special districts.

4/ HURF includes only employee estimates of annual per person fuel taxes, vehicle registration fees, and vehicle license taxes that flow into the HURF.

5/ State-shared sales taxes received by City of Tucson for its General Fund. Does not include state-shared Highway User Revenue Funds or state-shared taxes received by other cities and towns in Pima County or the County itself.

Source: Elliott D. Pollack & Company; IMPLAN; Arizona Department of Revenue; Arizona Tax Research Association



Fiscal Impact of Tourism on State of Arizona

As outlined in Table 8c, approximately \$1.1 million would accrue to the State of Arizona in 2009. This includes \$655,500 in primary revenues such as the \$342,000 in direct sales tax collections and \$313,500 from bed tax collections. The remaining \$464,200 in projected impact would be generated by the employees who work in the tourism industry and the indirect and induced employees impacted by the ripple effects of the spending.

By 2010, the impact on the State of Arizona from the Baseball Tournament Facility would be over \$1.4 million. At stabilization (expected by 2011), the State would collect nearly \$1.7 million each year thereafter (in 2008 dollars). This figure assumes that 99,240 tourists would spend \$27.6 million each year.

In comparison, the 17,811 unique visitors to Pima County for the Chicago White Sox spring training games generate an estimated \$373,100 in revenues to the State annually. This represents direct primary revenues of \$147,000 in sales tax collections and \$63,600 in bed tax collections. In addition, the secondary impacts from the employees are estimated at about \$162,500 each year.



Table 8c

**Annual Fiscal Impact from Tourism
State of Arizona Revenues (Ongoing Annually)^{1/}
(2008 Dollars)**

Tournament Facility Visitors

2009

	Annual Primary Revenues		Annual Secondary Revenues from Employees					Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax	Employees Sales Tax	Income Tax	Vehicle License Tax	Unemployment Tax	HURF Fuel & Registration Tax	
Direct	\$342,000	\$313,500	\$132,700	\$64,000	\$18,168	\$53,148	\$26,069	\$949,600
Indirect	N/A	N/A	\$29,300	\$26,000	\$3,150	\$9,215	\$4,520	\$72,200
Induced	N/A	N/A	\$39,800	\$34,900	\$4,334	\$12,677	\$6,218	\$97,900
Total	\$342,000	\$313,500	\$201,800	\$124,900	\$25,651	\$75,040	\$36,807	\$1,119,700

2010

	Annual Primary Revenues		Annual Secondary Revenues from Employees					Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax	Employees Sales Tax	Income Tax	Vehicle License Tax	Unemployment Tax	HURF Fuel & Registration Tax	
Direct	\$435,800	\$399,400	\$169,100	\$81,600	\$23,147	\$67,715	\$33,214	\$1,210,000
Indirect	N/A	N/A	\$37,300	\$33,100	\$4,013	\$11,741	\$5,759	\$91,900
Induced	N/A	N/A	\$50,700	\$44,400	\$5,521	\$16,152	\$7,922	\$124,700
Total	\$435,800	\$399,400	\$257,100	\$159,100	\$32,682	\$95,607	\$46,895	\$1,426,600

2011 & Thereafter

	Annual Primary Revenues		Annual Secondary Revenues from Employees					Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax	Employees Sales Tax	Income Tax	Vehicle License Tax	Unemployment Tax	HURF Fuel & Registration Tax	
Direct	\$511,600	\$468,900	\$198,500	\$95,800	\$27,176	\$79,501	\$38,995	\$1,420,500
Indirect	N/A	N/A	\$43,800	\$38,800	\$4,712	\$13,784	\$6,761	\$107,900
Induced	N/A	N/A	\$59,600	\$52,200	\$6,482	\$18,963	\$9,301	\$146,500
Total	\$511,600	\$468,900	\$301,900	\$186,800	\$38,370	\$112,248	\$55,058	\$1,674,900

White Sox Spring Training Visitors

	Annual Primary Revenues		Annual Secondary Revenues from Employees					Total Annual Revenues
	Direct Sales Tax	Direct Bed Tax	Employees Sales Tax	Income Tax	Vehicle License Tax	Unemployment Tax	HURF Fuel & Registration Tax	
Direct	\$147,000	\$63,600	\$47,500	\$22,100	\$6,646	\$19,441	\$9,536	\$315,800
Indirect	N/A	N/A	\$9,700	\$8,600	\$1,043	\$3,051	\$1,496	\$23,900
Induced	N/A	N/A	\$13,600	\$11,900	\$1,479	\$4,326	\$2,122	\$33,400
Total	\$147,000	\$63,600	\$70,800	\$42,600	\$9,167	\$26,817	\$13,154	\$373,100

^{1/} Total may not equal sum of impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures. All of the above figures do not include revenues distributed to counties, cities, and towns. All of the above figures are representative of major revenue sources for the State of Arizona. Figures are intended only as a general guideline as to how the state could be impacted by the project. The above figures are based on current economic structure and tax rates of the State of Arizona.

Source: Elliott D. Pollack & Company; IMPLAN; Arizona Department of Revenue; Arizona Tax Research Association



5.0 Tourism Impact Summary

The following table summarizes the impacts generated by tourism spending from visitors to Pima County attending or participating in games at the proposed Baseball Tournament Facility and compares the results to the impacts generated by Chicago White Sox spring training visitors. The table displays the impact over four years through the end of the current contract with the Chicago White Sox (2012). However, it is important to note that the Baseball Tournament Facility would continue to operate and generate both economic and fiscal impacts for Pima County annually thereafter.

At stabilization, the Baseball Tournament Facility is expected to host 7,886 games that would attract 99,240 non-local visitors to Pima County each year. These tourists would spend \$27.6 million in the local economy. In comparison, the spring training games of the Chicago White Sox in March of each year attract an estimated 17,811 unique, non-local visitors that spend \$6.2 million in that month.

Thus, the total impact over the remaining four years of the contract is greater from the visitors generated by the Baseball Tournament Facility than from the tourism revenues generated by the Chicago White Sox visitors. Indeed, the spending of the tourists attending the youth baseball tournament games would generate 594 direct, indirect and induced jobs with \$16.5 million in wages and \$45.7 million in economic output. The spending of the spring training tourists, on the other hand, generates 142 jobs (annualized) with \$3.8 million in wages and \$10.3 million in economic output.

In terms of the fiscal impact, the Pima County revenues in Table 9 are projected based on all assumptions being realized each year. Thus, the visitors to the Baseball Tournament Facility would generate \$3.1 million over the four year impact period while the spring training visitors would generate \$755,000 through the remainder of the White Sox contract. Overall, the impact from the Baseball Tournament Facility is over \$2.3 million greater over the four years than the impact from the Chicago White Sox spring training visitors.

Again, this report does not attempt to measure the possible fiscal consequences created by a recent trend of major league baseball teams relocating spring training facilities and the challenges Pima County faces in retaining its spring training teams in the future.



Table 9

Tourism Impact Summary
Impact on Pima County through 2012**
Baseball Tournament Facility compared to White Sox Departure
(2008 Dollars)

Baseball Tournament Facility	Stabilized^{2/}				
	2009	2010	2011	2012	4-Year Total
<u>Economic Impact</u>					
Jobs	397	506	594	594	
Wages	\$11,019,000	\$14,039,000	\$16,484,000	\$16,484,000	\$58,026,000
Economic output	\$30,552,000	\$38,927,000	\$45,702,000	\$45,702,000	\$160,883,000
<u>Fiscal Impact</u>					
Direct RTA excise tax	\$86,500	\$110,200	\$129,400	\$129,400	\$455,500
Direct bed tax	\$127,100	\$162,000	\$190,200	\$190,200	\$669,500
Direct rental car surcharge	\$45,200	\$56,400	\$66,300	\$66,300	\$234,200
Secondary revenues from employment	\$325,250	\$413,980	\$485,970	\$485,970	\$1,711,170
Total fiscal impact^{1/}	\$584,050	\$742,580	\$871,870	\$871,870	\$3,070,370
Chicago White Sox					
	2009	2010	2011	2012	4-Year Total
<u>Economic Impact</u>					
Jobs	142	142	142	142	
Wages	\$3,764,000	\$3,764,000	\$3,764,000	\$3,764,000	\$15,056,000
Economic output	\$10,330,000	\$10,330,000	\$10,330,000	\$10,330,000	\$41,320,000
<u>Fiscal Impact</u>					
Direct RTA excise tax	\$26,600	\$26,600	\$26,600	\$26,600	\$106,400
Direct bed tax	\$36,100	\$36,100	\$36,100	\$36,100	\$144,400
Direct rental car surcharge	\$12,800	\$12,800	\$12,800	\$12,800	\$51,200
Secondary revenues from employment	\$113,250	\$113,250	\$113,250	\$113,250	\$453,000
Total fiscal impact^{1/}	\$188,750	\$188,750	\$188,750	\$188,750	\$755,000
Baseball Tournament Facility less White Sox Visitors					
Net revenue difference	\$395,300	\$553,830	\$683,120	\$683,120	\$2,315,370

**Current Chicago White Sox lease through 2012.

^{1/} The total may not equal the sum of the impacts due to rounding. All dollar figures are in constant dollars. Inflation has not been included in these figures. All of the above figures are representative of the major revenue sources for the county. The figures are intended only as a general guideline as to how the county could be impacted by the project. The above figures are based on the current economic structure and tax rates of the county.

^{2/} This is the anticipated stabilized revenue that would occur each year hereafter while the youth tournament league is in operation.

Source: Elliott D. Pollack & Company; IMPLAN; Arizona Department of Revenue; Arizona Tax Research Association

Under the same four-year timeframe, the Baseball Tournament Facility would produce over \$3.7 million for local communities while White Sox spring training would bring in \$837,200, a difference of over \$2.9 million in favor of the Baseball Tournament Facility.

Similarly for the State, the Baseball Tournament Facility would bring in over \$4.4 million more in tax dollars over the next four years than the White Sox remaining through the 2012 season.



Findings of Market Feasibility Study Tucson Youth Baseball Tournament Facility

Chicago White Sox, Ltd.
August 22, 2008

Summary

As a complement to the Economic Study of the proposed Youth Baseball Tournament Facility, this brief report reviews similar youth baseball facilities around the country and describes the exploding demand for these facilities from a wide variety of established youth baseball organizations, a few of which are detailed in the pages that follow.

The independent Economic Study by Elliott D. Pollack & Company estimates that the stabilized Youth Baseball Tournament Facility in Pima County will generate almost \$46 million in economic output each year, over four times that created by the Chicago White Sox each spring training. The study also projects an increase of fiscal impact (tax dollars) of over \$2.3 million for Pima County, over \$2.9 million for local communities (primarily Tucson) and over \$4.4 million for the State of Arizona when comparing the Youth Baseball Tournament Facility to White Sox spring training over the next four years.

Those unfamiliar with the growing popularity of youth sports, particularly youth baseball, and the dollars families are willing to commit to first-class training and competition, may be surprised by the numbers. About 9 million (*Rapp, 2005*) kids play baseball each year in some organized competition. With specialization and the increasing desire of kids and parents for year-round programs promoting athletic excellence, long-term demand clearly exists for programming and a facility such as the one proposed in Pima County.

Elite baseball teams more and more have moved away from traditional league play (traditional Little League and Pony League) to the travel baseball team model. By definition travel teams expect to travel. Playing on a travel team requires a family commitment to travel. Some travel is local, some regional, but often the travel is national in scope. Families willingly travel across the country to be part of the travel player's dream.

As the following pages illustrate, demand for youth baseball facilities currently overwhelms supply, and this demand is only expected to grow in coming years. Similar facilities in Texas (The Ballfields at Craig Ranch), Tennessee (Gameday Baseball) and Georgia (East Cobb) quickly provided ROI and quickly fill to capacity in terms of games and tournaments. Still demand grows.

The proposed facility in Pima County would offer a very unique experience when compared to existing sites. First, it's location in Tucson provides a year-round option for teams playing in the North and all across the United States. Next, because of the existing Major-League facility and fields, Tucson's Youth Baseball Tournament Facility would truly be state-of-the art, offering teams and kids a Major-League experience unmatched by other facilities in the nation. And finally, Tucson is a special destination, offering 12-months of potential competition in a wonderful city with amenities and entertainment opportunities for visitors and participants far beyond the baseball diamond.

Pima County and the City of Tucson are attractive destinations for youth teams, participants and families, not just for the baseball experience offered at the Youth Baseball Tournament Facility, but also for the other vacation choices offered in and around the community. From the natural desert experience found from Sabino Canyon to the National Parks filled with native cactus, to popular vacation spas and resorts in the Foothills, to great golf courses and other sports options, and to the city's many zoos and museums, Tucson is popular to visitors for the very same reasons it remains such a great place to live for its year-round residents.

Our modeling projects 68 days of tournament play for the Pima County site in the first year of operation, 80 days of tournament play in the second year of operation and 101 days of play in the third year of operation when we expect the business to become stabilized. We believe these are realistic estimates given the key facilities summarized in this report are averaging about 100 tournament days per year, despite having operating seasons shorter in duration than the Tucson facility.

In completing our research, the economic benefit of tournaments on the local economy was recognized time and time again:

- East Cobb, Marietta, Georgia — \$97.2 million to local spending, of which \$46.7 million remains in local income, from one tournament held over 31 days during the summer
- Cooperstown Dreams Park proposed Louisville, Kentucky expansion— over \$100 million dollars in economic impact
- The Ballfields at Craig Ranch, McKinney, Texas — Over 1,000,000 in attendance over an 18-month period with an estimated impact to the community of over \$100 million
- Super Series Baseball of America — Estimated that each qualifying tournament (two-day) generates \$2 million and each national tournament (eight-day) \$6 million of economic impact to the community

We envision a Pima County facility filled on a year-round basis with kids and families who have a passion for the game of baseball, are happy and willing to travel to Tucson to see their players compete against the very best, and who plan their schedules around the sports activities of their children.

As the sports industry has recognized and this report illustrates, youth sports has become big business, with baseball leading that charge because of the great numbers of participants. In the following pages, you will read more detailed information on similar facilities located throughout the country, their sizes and programming plans, and you can also familiarize yourself with the various youth baseball organizations who would consider Pima County a prime location for their next youth baseball tournament.

We believe very strongly in the potential of a Youth Baseball Tournament Facility in Pima County and look forward to discussing how we make this a reality in the very near future.

Why will the Tucson Youth Baseball Tournament Facility succeed?

1. The Tucson facility will operate year round. A distinct advantage when compared to other facilities.
2. The playing fields:
 - a. Eight lighted fields
 - b. All grass infields, which are preferred and in demand
 - c. Major league quality fields
 - d. First facility at Major League spring training facility
 - e. Roger Bossard, the renowned White Sox head groundskeeper, has devised a movable dirt mound that will provide great flexibility and the best pitching mound configurations in the country.
3. The city of Tucson and Pima County will attract visitors to the facility.
4. The only tournament facility in the country affiliated with Major League Baseball and a Major League Baseball team.
5. The Southwest United States is in need of a tournament facility destination.
6. There is a great demand in the travel baseball communities for first class facilities with multiple fields at one single location.
7. This will be a first class facility consistent with the way the White Sox approach all business ventures.
8. The facility will be considered in the elite class of facilities across the country.
9. We have already begun to create the network which will lead to key partners in the travel baseball community wanting to play games at the Tucson Facility. This begins with the relationship we have built with Top Choice Baseball and is demonstrated in our involvement in the creation and ongoing commitment of the National Youth Baseball Championships.

Key Youth Baseball Organization Relationships

An important aspect in attracting quality tournaments to the Tucson Tournament Facility will be established relationships within the youth baseball community. Certainly, there is a shortage of quality facilities across the country and as result the facility itself will attract tournaments. However, relationships with key players in the youth baseball community will also be important. Following are some the key organizations which we expect to play a role in building the tournament facility business in Tucson.

Top Choice Baseball

The Chicago White Sox have utilized the expertise of Top Choice Baseball in analyzing and researching the feasibility of the Tucson Tournament Facility. Since 1999 Top Choice has hosted 138 tournaments. Top Choice started running tournaments in Tucson in 1999 and expanded to the Phoenix market in 2001 based on the need for additional quality facilities to host tournaments. In 2008, the company will run 24 tournaments, over 55 days, with an average of 72 teams per tournament, providing over 1,700 teams the thrill of competing in Top Choice hosted tournaments. Rick Perreault, the owner of Top Choice Baseball, is currently the Arizona State Director of Super Series Baseball of America and in July 2008 becomes the Western Regional Director of United States Specialty Sports Association (USSSA).

National Youth Baseball Championships

On June 4, 2008, Eddie Einhorn, Vice Chairman of the Chicago White Sox, announced plans to have the eight top national youth baseball organizations — consisting of more than 8 million players — to compete in an annual tournament to crown one National Youth Baseball Champion. The Board of Directors of the Major Youth Baseball Alliance, LLC (MYBA), will be made up of the highest-ranking officials of the eight participating organizations. They include Richard Neely, President, AABC; Chet Lemon, National Chair for Baseball, AAU; Steve Tellefson, President and CEO, Babe Ruth Baseball; Wes Skelton, Commissioner, Dixie Youth Baseball; Charles Blackburn, Executive Director and CEO, NABF; Abe Key, President and CEO, PONY Baseball; Mark Mathew, President and CEO, Super Series Baseball of America; Don DeDonatis, Chairman and CEO, USSSA; and Eddie Einhorn, Vice Chairman of the White Sox, who will serve on the Board as Interim Executive Director.

The MYBA Advisory Board will include Jerry Reinsdorf, Chairman, Chicago White Sox and Chicago Bulls; Cal Ripken Jr., Member, National Baseball Hall of Fame; Dr. Harvey Schiller, President, International Baseball Federation; and Dennis Gilbert, Chairman, Professional Baseball Scouts Foundation and Special Assistant to the Chairman of the Chicago White Sox.

Through the Major Youth Baseball Alliance, every young athlete who participates in youth baseball will have the opportunity to win a U. S. National Championship in his or her age group. Until this summer, these established youth baseball organizations have crowned their own individual champions, but there has never been a Championship Tournament—involving teams from all major organizations—to determine a true National Youth Champion.

This year's inaugural tournament will feature 10-under and 12-under divisions—which includes more than 100,000 teams—with plans to grow the tournament to include as many as eight different age groups in the future. Nearly 80 percent of all participants in youth baseball in the United States—more than 8 million young players—play in the well-established leagues that make up the Major Youth Baseball Alliance, LLC.

The city of Memphis, Tennessee, has been selected to host the “National Youth Baseball Championships” through 2010. Games will be played at the 10-diamond Gameday youth baseball complex. (*AAUNews.org, 2008*)

United States Specialty Sports Association (USSSA)

The primary focus of USSSA Baseball is the development of programs that allow teams of all skill levels to compete against one another. USSSA believes the overall development of all players can be enhanced by the experience and fun of national tournament play. Until now, the majority of players were denied this opportunity because of their skill level. USSSA Baseball offers programs for four levels of play. Major and AAA programs are national programs that culminate in a World Series. The AA program is a regional program ran by the participating states that culminates at a National tournament. The A level is for recreational teams and is held at the state level only.

Major Division — The top competitive teams in the country.

AAA Division — Middle of the pack competitive teams.

AA Division — Teams that have restricted rosters, drafted players, or play at the recreation level.

A Division — Recreational League teams only. (*USSSA Baseball-About USSSA, 2007*)

USSSA will sponsor over 21,000 events throughout the United States, of which over 2,200 will be held in the Southwest and 103 in Arizona.

Super Series Baseball of America (Super Series)

According to the 2005 Super Series media guide, Super Series sanctions nearly 800 qualifying tournament events and more than 40 summer and winter National Championship events. The events attract over 5 million participants and fans each year as more than 100,000 teams compete in tournament in over 38 states. The economic impact from qualifying tournaments is estimated at \$2 million for each tournament and \$6 million for each week in every national championship tournament. They estimate that over 2,500 players, coaches, parents and fans travel to each qualifying tournament, while 5,000 to 7,500 fans travel to national championship tournaments. They average 55 teams for qualifying tournaments. (*Super Series Baseball Media Guide*)

Triple Crown Sports

Triple Crown Sports has run youth baseball tournaments since 1995. Triple Crown Sports runs qualifying tournaments all over the United States culminating in Championship events. To qualify for Championship events, teams must qualify by participating in a Triple Crown tournament. Triple Crown is a franchised business with owner-operators in several states. (*Triple Crown Sports, 2008*) A review of the 2008 tournament schedule indicates that they run approximately 220 baseball tournaments throughout the country, 11 of which are held in Arizona. Tournament per team fees range from \$400 to \$650, with typical fees running in the \$550 to \$600 range.

Comparable Facilities

East Cobb

The eight-field East Cobb facility is located in Marietta, Georgia about 10 minutes from downtown Atlanta. Cobb County's 2006 population was 679,325. East Cobb operates 47 tournaments over 142 days. The facility is open from February 29 through November 2 (essentially eight months). Baseball tournaments are hosted from the ages 8 through 18. The typical two-day tournament attracts between 38 to 44 teams and the typical three-day tournament between 48-54 teams. Team fees range from \$450 to \$700 per team with the typical tournament costing about \$550 per team. (*East Cobb Baseball: Tournament Schedule, 2008*) East Cobb hosts the WWBA wooden bat tournament, in association with Perfect Game USA, over a period from June 20 to July 26 representing 31 tournament dates. According to the Cobb County Visitors Bureau, the impact of the WWBA event in Cobb County is roughly \$46.7 million with a gross impact on local spending of \$97.2 million. During this one month period visitors fill an approximate 20,000 hotel nights (*Cobb County CVB, 2008*).

Cooperstown Dreams Park

This 22-field complex is located four miles south of Cooperstown, New York. It operates over a 12-week period from June through August. The facility includes bunk houses where players and coaches must stay during tournament play. Each week, 96 teams compete in week-long tournaments. Some 1,152 teams from across the country compete in the summer tournaments. Construction of the facility began in 1996 and due to incredible demand (the facility sells out each year), the facility has grown to its current 22-field configuration. The facility hosts primarily 12-year-old-tournaments with a few 10-year-old-tournaments as well. (*Cooperstown Dreams Park, 2008*) Lou Presutti, owner of Cooperstown Dreams Parks, is expected to open a similar facility in Louisville, Kentucky possibly in 2009. In addition, he is looking to open two additional Louisville complexes over the next seven years. Once completed, one complex would host tournaments for boys ages 8-11, a second facility for boys 13 years of age and the third facility would be for girls softball. Cooperstown Dreams Park turns away 3,000 teams each year. According to Diane McGraw, executive director of the Louisville Sports Commission, the economic impact of just one of the facility could be \$40 to \$50 million dollars. With three parks the economic impact could be over \$100 million dollars. Assistant Metro Parks Director Marty Storch said "It would be like having the Ryder Cup in Louisville every year." (*Warren, 2007*)

Ripken Baseball

Ripken Baseball runs tournaments out of two Academies located in Aberdeen, Maryland, and Myrtle Beach, South Carolina. The Aberdeen facility is the best comparison to the proposed Tucson Facility, although, it does offer services that go beyond tournaments, including overnight day camps and instructional camps. The Aberdeen facility also hosts to The Cal Ripken World Series. The Aberdeen complex features eight fields (without lights, which restrict the number of teams the facility can handle) and hosts 24 tournaments over 51 days from June through October.

For two-day tournaments the Maryland facility typically has up to 38 teams and for three-day tournaments up to 54 teams. The per team fee for two-day tournaments is \$695 and for three-day tournaments \$795.

The Myrtle Beach experience is not comparable to the Tucson proposal. This experience includes an entire vacation package for the family, requiring on-site accommodations in villas and many other amenities such as a water parks, mini golf, par 3 golf courses and a NASCAR speed park. Fees are per player based resulting in team fees in excess of \$10,000 per team. (*RipkenTournaments, 2008*)

The Ballfields at Craig Ranch

This nine baseball field and five softball field facility opened in 2005. The facility is located in McKinney, Texas outside of Dallas, Texas. Based on a review of The Ballfields at Craig Ranch website, the facility held 27 tournaments over 85 days in 2007. A typical tournament hosts between 48 and 72 baseball teams. (*The Ballfields at Craig Ranch - Baseball : Tournaments :Results, 2008*) In a 2006 article with the McKinney News, The Ballfields at Craig Ranch vice president, Ray Ricci indicated that in its first 18 months of operation, more than 1,000,000 people went through the facilities gates. The facility is sold out every weekend for tournaments, and on average, well over 100 teams participate in the tournaments. Mr. Ricci is quoted as saying, “We found a great niche and a great need for this kind of application.” He also indicates that the business grew faster than they expected, “We thought we’d be here in five years. We never thought we’d be here in two.” He attributes their success to field conditions and customer service and estimates the economic impact to the community in the hundreds of millions of dollars. (*Gilliam, 2006*)

Game Day Baseball Home of First Tennessee Fields

Gameday Baseball opened its 10 field youth baseball facility in 2005. It’s located in Cordova, Tennessee outside of Memphis. A review of the Game Day website indicates that they will run approximately 35 tournaments over 128 days in 2008, including the inaugural National Youth Baseball Championship. Tournament per team fees are between \$300 to \$700 per team based on various factors. With typical fees greater than the \$400 estimate used in the study. (GameDay Baseball Tournaments, 2008) In May of 2008, as a result of the success of the 10-diamond youth baseball complex, Gameday announced plans to expand the facility to include a sportsplex. It is estimated that about 50,000 young baseball players have traveled with coaches, families and chaperones from across the country each year to participate. (*Pamela Perkins, 2008*)

Other youth baseball organizations

In addition, there are several other youth baseball entities, which while important, do not present the same opportunity for tournament business at the Tucson Facility. These include: (1) Little League Baseball; (2) The American Amateur Baseball Congress (AABC); (3) Amateur Athletic Union (AAU); (4) Babe Ruth Baseball; (5) Dixie Youth Baseball; (6) National Amateur Baseball Federation (NABF) and (7) Pony Baseball. These organizations tend to concentrate on local leagues with teams advancing in their own organized and run tournaments. We will build relationships with each of these organizations since they are important players in youth baseball.

The Phoenix Tournament Market

Top Choice estimates that there will be approximately 100 youth baseball tournaments held in Phoenix in 2008. There are several facilities that host these tournaments. They include: (1) Peoria Sports Complex — an eight-field complex with grass infields configured to 60 feet 6 inch pitching mounds and 90 feet bases (60/90); (2) Rio Vista in Peoria — seven fields with dirt infields for youth baseball games; (3) Red Mountain/Gene Autry in Mesa — a six-field complex with grass infields (60/90); (4) Victory Lane in Glendale — six fields with dirt infields for youth baseball games; and (5) Big League Dreams in Gilbert — eight fields with dirt infields for youth baseball games.

Major League Baseball Youth Academy Tucson, Arizona

Major League Baseball (MLB) has indicated its desire to open a Major League Baseball Youth Academy in Tucson in conjunction with the Youth Baseball Tournament Facility. MLB Academies aim to set the standard of instruction, teaching and education for underprivileged youth and to enhance the quality of life in surrounding communities. MLB Academies are as much about serving community youth as the development of great baseball players. Programming is not just focused on the development of superior baseball players, but more importantly, on the education and development of all the participants. Great focus is given to education and vocational training in addition to the baseball and softball instruction.

The MLB Youth Academy would utilize the Tucson Youth Baseball Tournament Facility fields to run programming mirroring the successful and well-regarded Urban Youth Academy in Compton, California. The MLB Academy has hosted large events like the Urban Invitational and the Breakthrough Series. MLB Academy teams play in international competitions throughout the world (Japan, Australia). MLB has indicated that the Tucson Youth Baseball Tournament Facility would be a potential site for its RBI Regional tournaments and international competitions in the future. Programming would not interfere with the planned tournaments and leagues run by the Youth Baseball Tournament Facility.

Because of the timing of MLB's commitment to Tucson, the positive impact of the MLB Academy on the Youth Baseball Tournament Facility was not factored into the economic impact study nor this feasibility study. Clearly, Major League Baseball's presence at the facility and the affiliation with the Major League Baseball brand will in enhance the tournament facility's marketability.

**Tucson Tournament Facility
Comparison of Facilities**

Facility	Length of Season	Baseball Fields			Typical teams in 2 day tourney	Typical teams in 3 day tourney	Pricing per team	Tournaments	
		Grass	Dirt	Total				Number	Days
Tucson Tournament Facility	Year round	8	0	8	48	48	\$400/average	32 to 47	68 to 101
East Cobb Opened 2001	March to October	4	4	8	38 to 44	48 to 54	\$450 to \$700, typical \$550	47	142
Cooperstown Dream Park Opened 1996	June to August	22	0	22	96 per week	96 per week	approximately \$10,000	12	84
Ripken Baseball Aberdeen Opened 2003	June to October	4	4	8	38	54	\$695 or \$795	24	51
The Ballfields at Craig Ranch Opened 2005	March to November	9	0	9	48	48 to 72	\$200 to \$375	27	85
Gameday Baseball Opened 2005	March to October	10	0	10	na	27 to 54 avg 46	\$200 to \$575, \$375 typical	63	128

Conclusion

The Pima County Kino facility provides a unique opportunity to enter the tournament facility market. After a significant investment by the White Sox in field renovation and conversion, the facility will match and surpass the very best facilities in the country. Tucson provides the perfect backdrop for the facility as families look for the best destinations to participate in the travel baseball experience. In addition to the economic impact of bringing out-of-town guests to Tucson, the facility also will provide local youth baseball programming, which will benefit the community. Our plans include running local leagues where the community's best teams will compete. We see a future where this facility serves the community by providing professional-level instruction through lessons, clinics and camps. We expect to be at the center of the baseball community in Tucson, promoting the game, teaching skills and reinforcing sportsmanship to make a difference in the lives of those we touch.

Based on an overwhelming demand for quality travel baseball facilities, we are confident that the Tucson Youth Baseball Tournament Facility will be a tremendous success. We know teams will travel from all across the United States to play on quality baseball fields in facilities run in a first-class manner in a vacation destination with the special year-round appeal of Tucson.

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MAJOR LEAGUE BASEBALL YOUTH ACADEMY TUCSON
SUMMARY OF OPERATIONS

WHAT: The Major League Baseball Tucson Youth Baseball Academy (MLB Youth Academy) would become part of Major League Baseball's Youth Initiative. The Tucson Academy will operate in conjunction with the new proposed tournament facility at the Kino Sports Complex. The renovated facility will feature an eight field converted spring training facility that will be absolutely spectacular. The complex will have four major league and four youth fields complete with scoreboards, seating, dugouts and lights. The state-of-the-art facility will feature eight batting cages, pitching mounds and other major-league caliber training facilities. The MLB Youth Academy will operate on a year-round basis, offering free baseball and softball instruction, as well as clinics, to youth throughout Southern Arizona.

MISSION

STATEMENT: To set the standard for instruction, teaching and education in Urban American through the strength of the National Pastime and to enhance the quality of life in the surrounding communities.

FACTS: The MLB Tucson Youth Academy will provide programming for more than 1,500 underserved Tucson community children annually.

LOCATION

AND SELECTION: The MLB Youth Academy's location was selected by MLB for its diverse and challenging population. African-Americans, Hispanics and Native Americans will comprise a large percentage of the population of the Academy. Many families within the Tucson area are functioning despite challenging economic circumstances, while the surrounding communities face similar diverse populations and economic hardships.

The MLB Youth Academy will work in cooperation with Pima County, the Tucson Parks and Recreation Department, the local school districts, local Indian reservations and various chapters of the Boys & Girls Club of America, to select participants. The Academy will select recommended participants from throughout Southern Arizona, primarily involving youth from any underserved community.

MANAGEMENT

TEAM: The MLB Youth Academy will be directed by a former local player, with the support and direction of former Angels player and Director of Player Development, Darrell Miller. Additional part time staff at the MLB Youth Academy will help coordinate the day-to-day programming and operations.

INSTRUCTIONAL

COMPONENTS: Instructional Leagues

The MLB Youth Academy will offer Major League quality baseball and softball instruction for all levels of youth, from age eight through high school. Instructional leagues are broken into five groups based upon age and gender. Leagues will vary in length, consisting of one week, two weeks and month-long seasons.

Three instructional leagues (spring, summer and fall) will be offered during the first calendar year of operation.

Spring League

The spring instructional league will consist of fundamental baseball instruction twice per week. More specialized instruction for advanced players will be offered on evenings and Sunday afternoons.

Summer League

Summer leagues will consist of six weeks of Major League-caliber training for youth ages eight-17. Children ages eight-13 will attend morning sessions, while high school-aged players will train from 2-6 p.m.

Fall League

The fall instructional league consists of fundamental baseball instruction twice per week. More specialized instruction for advanced players will be offered on evenings and Sunday afternoons.

CLINICS, CAMPS

GAMES AND

SYMPOSIUMS: Over the course of the first year, many current and former Major League players, coaches, umpires and groundskeepers will offer a variety of free clinics, camps, and discussions to both children and adults. Among those scheduled to take place at the MLB Youth Academy during the first year of operation are:

MLB Frank Robinson Hall of Fame Coaches' Clinics

The Positive Coaching Alliance and Frank Robinson will team up with the MLB Youth Academy to instruct local coaches on the finer points of baseball and softball coaching and player development. Focus also will be on character development in players and

using baseball as a tool to foster team goals and other person-centered behavior. The MLB Youth Academy coaching program awards a certificate of completion at the conclusion of the program.

MLB Youth Academy Baseball Camps and Clinics

Several current and former Major League baseball players and coaches will provide instructional clinics during the first year of operation. Among those who may provide free instruction are Hall of Famers **Rod Carew** and **Tony Gwynn**, as well as **Enos Cabell** (former Houston Astros), **Jim Lefebvre** (former Los Angeles Dodger), **Reggie Smith**, **Tommy Davis**, **Maury Wills**, **Kenny Landreaux** (LA Dodgers), and **Don Slaught** (former Pittsburgh Pirate). Current major league stars periodically will stop by the MLB Youth Academy in Tucson to instruct and inspire youth in Arizona, subject to schedule availability.

MLB Scouting Bureau Tryout Camp

The MLB Scouting Bureau will hold a try-out camp for all players 16 years of age and older in June, 2009. Players will receive instruction and have the opportunity to showcase their skills to a panel of MLB Scouts. In 2008 MLB Scouting Bureau joined together with USA Baseball and Mentoring Viable Prospects to create the Breakthrough Series. Each of these three organizations assembled 30-man teams with players from around the country who traveled to Compton, CA for three days of first class instruction and game play. The MLB Youth Academy also will be considered as a possible location of the 2010 Breakthrough Series.

Wood Bat Baseball League

The Academy will create and host a Tucson Fall Wood Bat Baseball League with the local high school, collegiate and free agent talent. In addition to a team representing the MLB Youth Academy, the location would host many of the games in the wood bat league.

“Slow the Game Down” Vision Training Clinics

The MLB Youth Academy and world-renown optometrist, Bill Harrison, team up for a *Slow the Game Down* vision testing and sports clinic, held at the Youth Academy in Tucson. Over 100 children, ages eight-13 will attend and participants will learn from doctors affiliated with “Slow the Game Down,” the connection between healthy eyes and sports performance. Following the clinic, participants will meet current Arizona Diamondback players.

USA-Japan All-Star Goodwill Series

The MLB Youth Academy could host the 2009 Japanese High School Federation All-Star Team in a USA-Japan Goodwill Series high school baseball tournament. The Japanese All-Star team also will travel to Compton, CA, to play the Urban Youth Academy in a three-game series. The Goodwill Series has been sanctioned by USA

Baseball since 1983, and some 40 percent of the American players who have participated in the Goodwill Series have appeared on Major League rosters.

MLB Scout League

A group of players pre-selected by Major League Baseball scouts will play in games every Thursday and Sunday, in the fall of 2009. The MLB Scout League consists of players scouts have selected – based on ability – to watch more closely.

Athletic Turf management and Groundskeeping Symposiums

Baseball fans, future coaches, current coaches, parks and recreation workers, etc will be invited to participate in quarterly MLB Athletic Turf management and Groundskeeping Field Days. Offered free of charge on a first-come, first-served basis, these popular events consist of a discussion with MLB Field Consultant Murray Cook about groundskeeping as a career choice. Additional topics include infield clay maintenance, field and ground maintenance, mound and home plate care, turf grass management, pre-game field preparations, including watering marking lines and proper field dragging techniques, batting practice set-up by MLB Youth Academy staff, as well as a question and answer session.

MLB Umpire Camps

The first-ever West Coast Major League Baseball Umpire Camps could be held at the MLB Youth Academy in Tucson in November 2009 or 2010. The camps would offer umpires at all levels the chance of a lifetime by providing the services and expertise from the best evaluators in the world, including current MLB umpires Derryl Cousins (27 years of service), Randy Marsh (24 years), Larry Young (21 years), Tim Tschida (20 years) and Kerwin Danley (nine years). The camp sessions consist of discussions in the morning, followed by on-field practice each afternoon. Attendees will improve their plate work, positioning for plays on the bases and situation management, as well as conditioning, and receive nutritional information, equipment and safety instruction.

High School Player workouts

High school baseball players from throughout Arizona will become eligible for the 2009-10 Major League Baseball Draft. These prospects will have the opportunity to work out for scouts from MLB and the 30 Clubs at the MLB Youth Academy in Tucson each February.

COMMITMENT

TO EDUCATION:

Major League Baseball and the MLB Youth Academy are committed to fostering not only baseball and softball skills, but also the drive and commitment it takes to stay in and succeed in school. Through various collaborations and mentoring programs with local Community Colleges and the University of Phoenix, those attending the MLB Youth Academy are given access to build computer skills, attend English, speech and personal development courses, and may receive an Associates Degree via online classes.

Through a partnership with the University of Phoenix, Academy participants who are age-eligible may take on-line courses to apply toward an Associates Degree. The goal of the program is to have a 60 percent college attendance rate by Academy participants who are eligible to attend college. A tutoring/mentoring program also is provided to all Academy participants by University of Phoenix Masters Degree graduates. As part of its commitment to the Tucson community, MLB will work with Pima County Community College to research and develop a scholarship program for MLB Youth Academy participants.