



Club Leadership Summit

***Uniting Club Presidents and Executives
Pursuing Effective Club Leadership and Governance***

Wednesday, September 6, 2023 • Chevy Chase Club • Chevy Chase, MD



Founded in 1927, the **Club Management Association of America (CMAA)** is the largest professional association for managers of membership clubs with more than 7,000 members throughout the US and internationally. Our members contribute to the success of 2,500 country, golf, athletic, city, faculty, military, town, and yacht clubs. CMAA promotes relationships between club management professionals and other similar professions; encourages the education and advancement of members; and provides the resources needed for clubs to operate efficiently and successfully.

Club Benchmarking delivers fact-based, actionable insight club leaders need to make informed decisions and our tools and services are built specifically for private clubs. Everything we do is grounded in data and research and we serve the full spectrum of club industry stakeholders – staff, management, boards, committees, members, owners, and industry constituents including associations. Leadership teams across the country rely on Club Benchmarking to accurately assess and benchmark the financial and operational health of their clubs. Our proven Financial Insight Model™ and Key Performance Indicators are the cornerstones of a common industry framework for understanding club finance.

People Focused, Quality Driven. When you work with **KOPPLIN KUEBLER & WALLACE (KK&W)**, you can expect an experience that will be centered around the well-being of their clients, the candidates they place, and the industry they love. Their process has been perfected since 1996 and involves merging more than 500 years of combined expertise with a comprehensive understanding of stakeholders' needs. Their Board Dynamics/Model has been presented to over 1000 private clubs and communities. They are an award-winning executive search and consulting firm and a trusted partner dedicated to the success of the organizations they work with.



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Club Leadership Summit

Purpose: To provide the most effective governance model and enhance partnerships between the Chief Executive and the President Elect/President or Chairman of the Board.

7:00 – 8:00 a.m.

Registration and Breakfast

8:00 – 8:30 a.m.

Program Overview, Learning Objectives, & Introductions

8:30 – 10:00 a.m.

Part 1 Theory: Club Governance

Effective Governance Models and Organizational Structure – Kurt Kuebler, CCM, KOPPLIN KUEBLER & WALLACE and John Schultz, CCM, CCE, Club Leadership Alliance

- *Organizational Health*
- *Trends*
- *Leading Club Best Practices – Successful Boards*
- *Roles and Responsibilities – Term limits, etc.*
- *Board and Committee Orientations – Engagement*

10:00 – 10:15 a.m.

Networking Break

10:15 – 11:45 a.m.

Part 1 Practice: Club Finance – Seeking Data

The Link Between Strategic Governance and Understanding Financial Models of Clubs – Jim Butler, CCM, CCE, PGA, Ph.D., Club Benchmarking

- *Understanding Financial Models of Clubs*
- *Application of Financial Models of Club to Improve Governance*

11:45 a.m. – 12:45 p.m. **Break (Lunch and Club Tour)**

12:45 – 1:45 p.m.

Part 2 Theory: Club Governance

Effective Board Evaluations – Kurt Kuebler, CCM, KOPPLIN KUEBLER & WALLACE and John Schultz, CCM, CCE, Club Leadership Alliance

- *Self-Evaluation and Board Efficiency*

1:45 – 2:00 p.m.

Break

2:00 – 2:30 p.m.

Part 2 Practice: Club Legislation

The Political Climate and the Impact on Clubs – Joe Trauger, National Club Association

2:30 – 3:30 p.m.

Part 2 Practice: Club Trends – Change and Adaptation

Post-COVID Club Trends – Jeff Morgan, FASAE, CAE, Club Management Association of America and Tom Wallace, CCM, CCE, KOPPLIN KUEBLER & WALLACE

- *Engagement of Multi-Generations of Members*
- *Strategically Setting Up the Board*
- *GM/CE and President/Chairman*
- *Strategy Model – VUCA, Competitive Forces vs. Internal Resources*
- *Data Driven Decision vs. Emotional Decision Making*
- *Club Trends post COVID*

3:30 – 4:00 p.m.

Moving Forward: Wrap up and key take-a-ways