



# **Board Dynamics/Model Clubs: A Guide To Creating Outstanding Organizational Health in Today's Club World!**

Florida Chapter CMAA  
November 2015

Presented by  
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"The Most Trusted Names in Private Club Executive Placement"



# Agenda

I

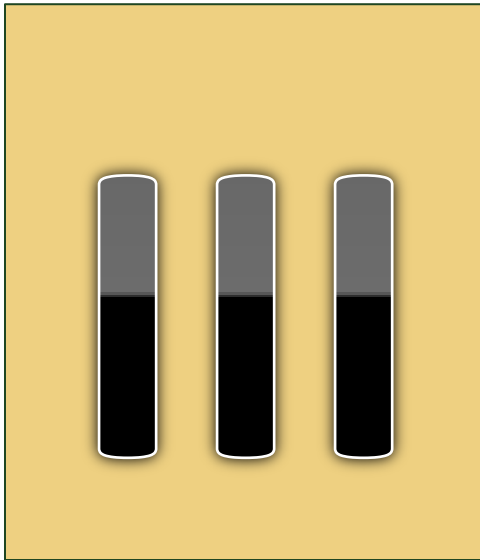
Trends Around the Country

II

“Board Dynamics/Model Clubs’ Best Practices” Overview

III

Strategic Planning



# Trends

Trends we see in clubs around the country

# We visit a number of clubs each year....



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# We get a first hand view of....

The good and great!

The 'holding their own'!

***And, the highly dysfunctional  
in the club world!!***

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# Trends

- Traditions are important, but need to evolve to keep pace with today's families, time demands, lifestyles, and overall demographic shifts – bylaws, overall usage and rules policies, dress codes, etc., ***should be reviewed and updated if necessary to reflect what is happening in the world today.***
- Continued casual and informal dining and styles -- clubs making changes to reflect where their members/families are going: sports bar concepts, Panera Bread-like offerings, Starbucks, etc. -- upscale/casual and, most importantly, **CONVENIENCE.**

# Trends

- Family Activities continue to be increasingly important at many clubs, *especially “off season” ones* -- fun social programming on a regular basis is a must, even when you can’t do it outside!
- Several clubs have added a family and/or activities coordinator, charged with developing, promoting and executing ONLY these programs; this role will be as important as the Golf Professional in coming years!
- Focus has turned toward increased **ENGAGEMENT** of existing members----*what can we do to get members using the club even more than they do at present.*

# Trends

- Resort style pool complexes, aqua centers, children's camps, junior golf and tennis programs are ALL activated, even in clubs where golf is "king", and even in Florida clubs!
- Health and fitness facilities; most on second or more expansions---***you almost can't do enough in the fitness/wellness side of operations.***
- Golf just not as important as it was; rounds are 'flat' all over the country----clubs are adding "nine and wine" social events for women, regular complimentary lessons especially for beginners, three hole groups, etc.
- *Strong focus on strategic business planning*, most done by the Board and GM/COO rather than a committee, as the they are generally becoming more strategically focused with their time and efforts.



# Trends

- **Quality of non-golf amenities are clearly important** to the buying/joining decision---the course gets you 'on the map'; the other amenities and activities (in country clubs) drive usage and attraction!
- **RELEVANCY** is critical for all programs and activities; just because "we've always done it that way" doesn't always work any longer.
- Clubs are adding many "Affinity Groups"; clubs within the club to bring more people together, even in smaller groups, more often. Making the Club the gathering point for as much as possible, even when the Club is not involved in anything but the starting point!
- ***Data, data, data is driving decision making*** more than it ever has in the past.

## What should Clubs be doing to 'stay ahead' of it all?

- There has to be clear 'value' for the membership; you must seek out ways of providing that value -- institute "Service Recovery Programs", QAP, PIP or similar programs---do we truly know where our deficiencies are, and do we have an actual plan to improve them! SERVICE in a "CHEERS-like" fashion is absolutely critical!
- Stay on top of satisfaction levels in key areas -- golf, dining, family activities, etc., and measure it regularly----surveys are MUCH more prevalent than in past years!
- Keep members well informed -- Town Hall meetings, e-blasts, regular focus groups, constant visibility and engagement, empowering of key staff to be 'in the loop,' and make sure you know what they want and are thinking---**EDUCATE wherever and whenever possible!**

# What should Clubs be doing to 'stay ahead' of it all?

- Determine whether the entire family is 'engaged' in the Club
  - Recent NGF study shows that a majority of members citing high likelihood of retaining membership have a spouse very interested in golf
  - 75% of those 'at-risk' of terminating membership indicate that their spouse is not interested in golf ("Junior" Board of Directors)
- Membership marketing is a full time role BY A STAFF MEMBER who can be held accountable -- only 33% of all clubs have someone truly dedicated and focused on this key role (not just administering the paperwork!)

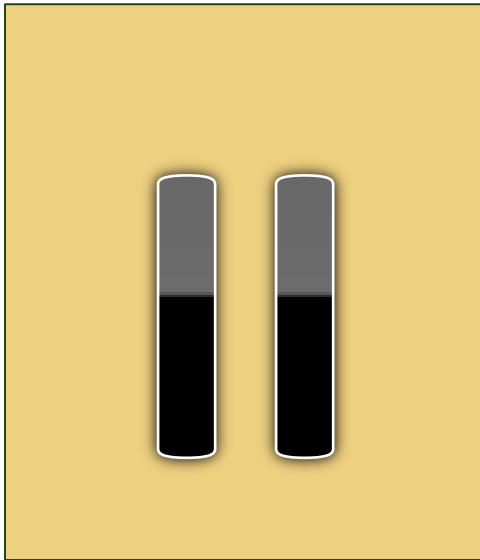
## What should Clubs be doing to 'stay ahead' of it all?

- ***Focus on Organizational Health!!*** If you aren't healthy there, none of the rest of this works!
- ***Keep the Club and amenities in great condition!*** If you are not proud of it, a prospective member probably won't be too excited about it, either!

## What are Clubs seeming to struggle with these days?

**You may not  
be alone!!**

- Funding of capital projects to maintain or keep up
- Dealing with changing demographics within the membership (long tenured members vs. younger ones with children!)
- Inconsistent governance from year to year
- Changing lifestyles – casualization, priorities, significant others, etc.
- Providing ‘more’ without being ‘all things to all people’
- Staying relevant with programs, activities and operating schedules
- Recruitment of new members – changing marketing focus, who is involved, follow up, etc.



# Board and Committee Dynamics, 'Model Clubs'...

and the Best Practices they use  
to stay that way!

# Now we're going to talk about both the Executive Team and the Volunteer Leaders of a Club...

And, our view of what seems to make  
them all most successful!

**The Highest Performers all  
have.....**

**Especially high  
Membership  
Satisfaction!**

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**And,  
perhaps the #1 element most  
common to the highest performing  
clubs we observe...**

**They get their  
GOVERNANCE and  
ORGANIZATIONAL HEALTH RIGHT!!!**

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**“Few organizations invest nearly enough time and energy in making their leadership teams cohesive, and certainly not with the level of vigor it requires and deserves.”**

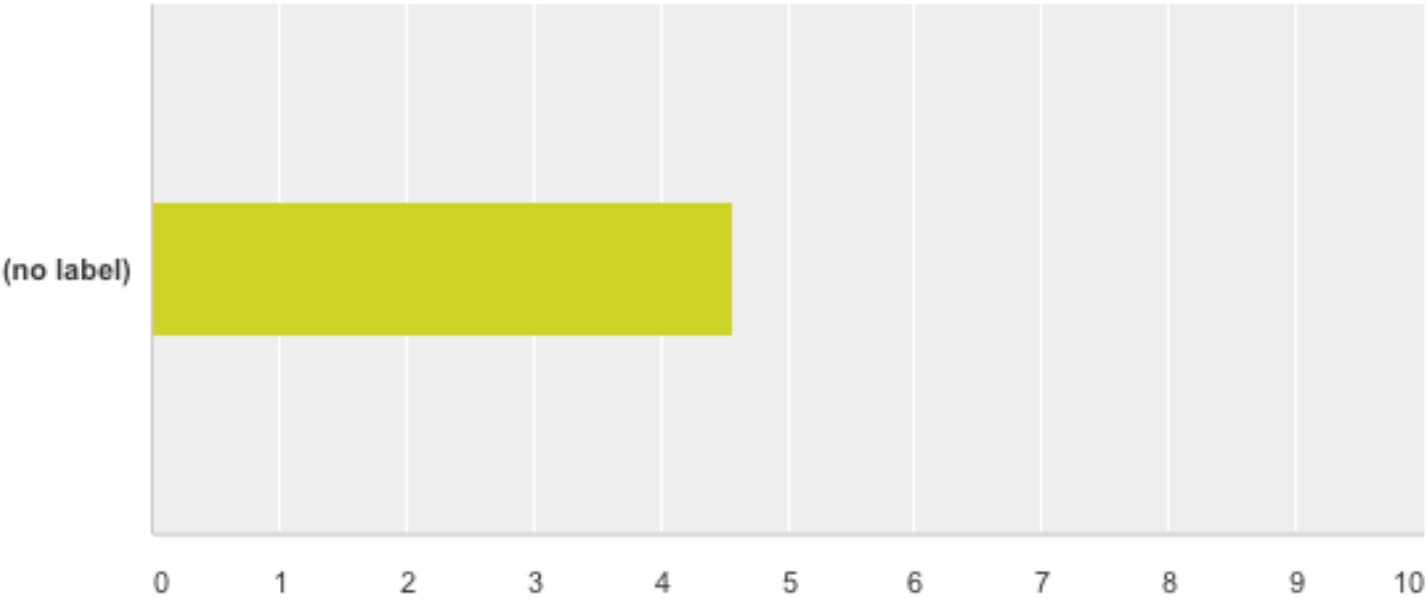
**Patrick Lencioni, Author**  
*The Advantage*

**As part of your organizational health review, we strongly encourage you to do an annual Board “Self Evaluation”**

*Here is one  
anonymous club's  
results.....*

As a group, our board is proactive in its efforts to understand the views of the club members.    Scale: 1=Strongly Disagree, 5=Strongly Agree

Answered: 7    Skipped: 0

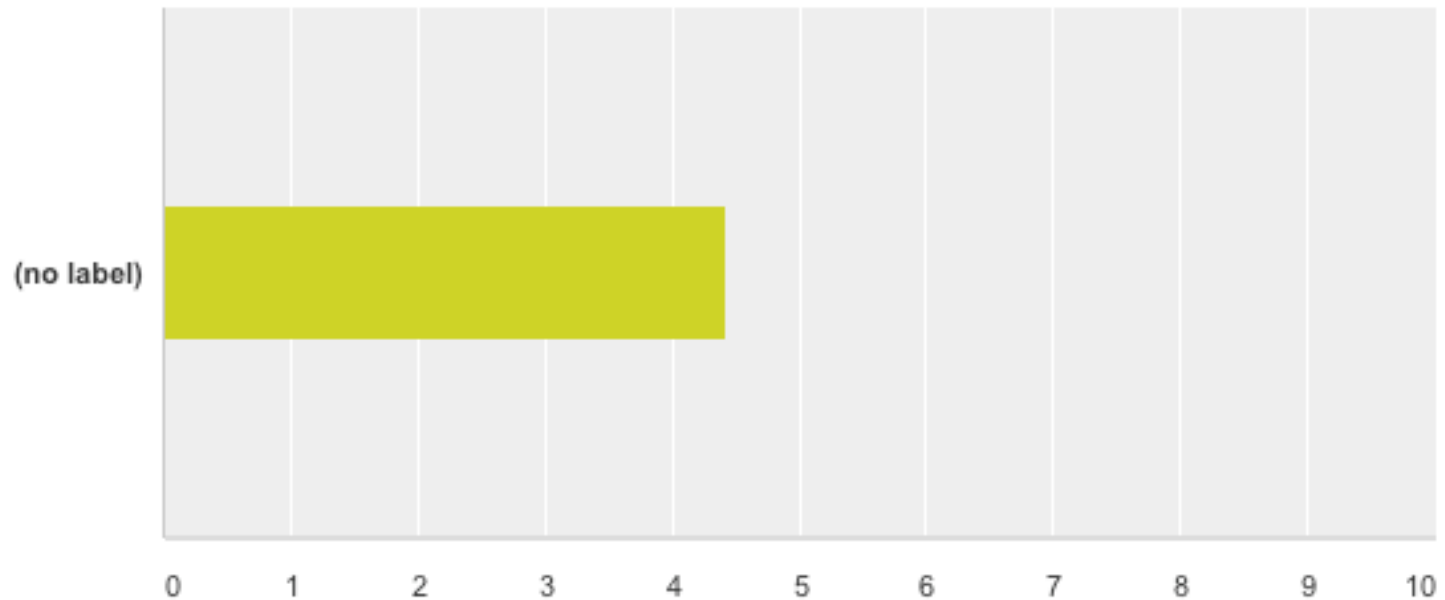


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(no label)	0.00% 0	0.00% 0	0.00% 0	42.86% 3	57.14% 4	7	4.57



The members of the board put the interests  
of the club above their personal and  
constituent interests. Scale: 1=Strongly  
Disagree, 5=Strongly Agree

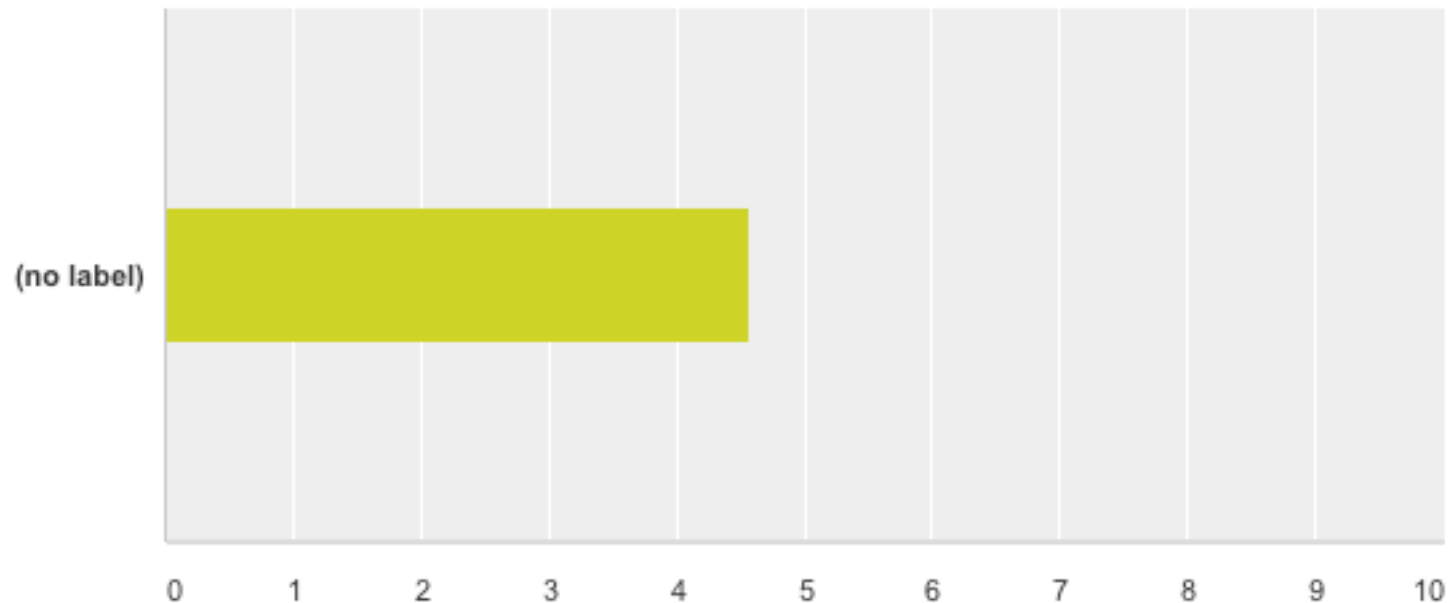
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	0.00% 0	57.14% 4	42.86% 3	7	4.43

**The board holds itself accountable to the club members for its performance. Scale: 1=Strongly Disagree, 5=Strongly Agree**

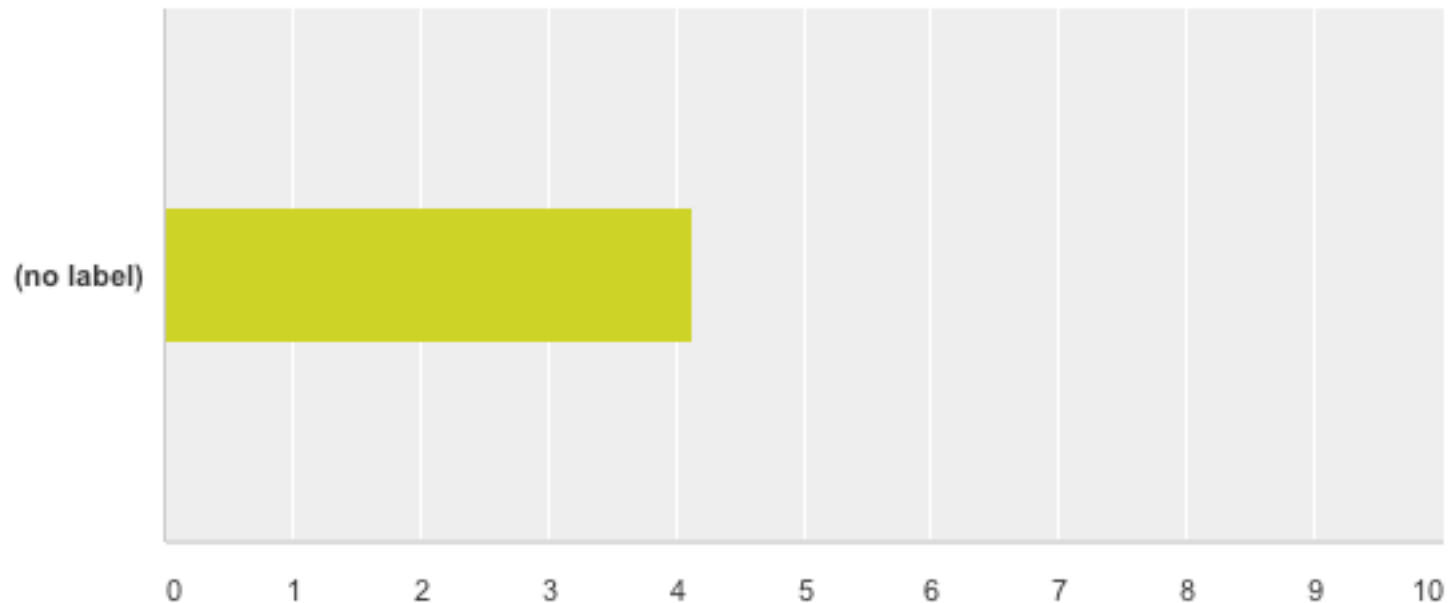
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	14.29% 1	14.29% 1	71.43% 5	7	4.57

**The board communicates with the members  
in a timely, transparent manner. Scale:  
1=Strongly Disagree, 5=Strongly Agree**

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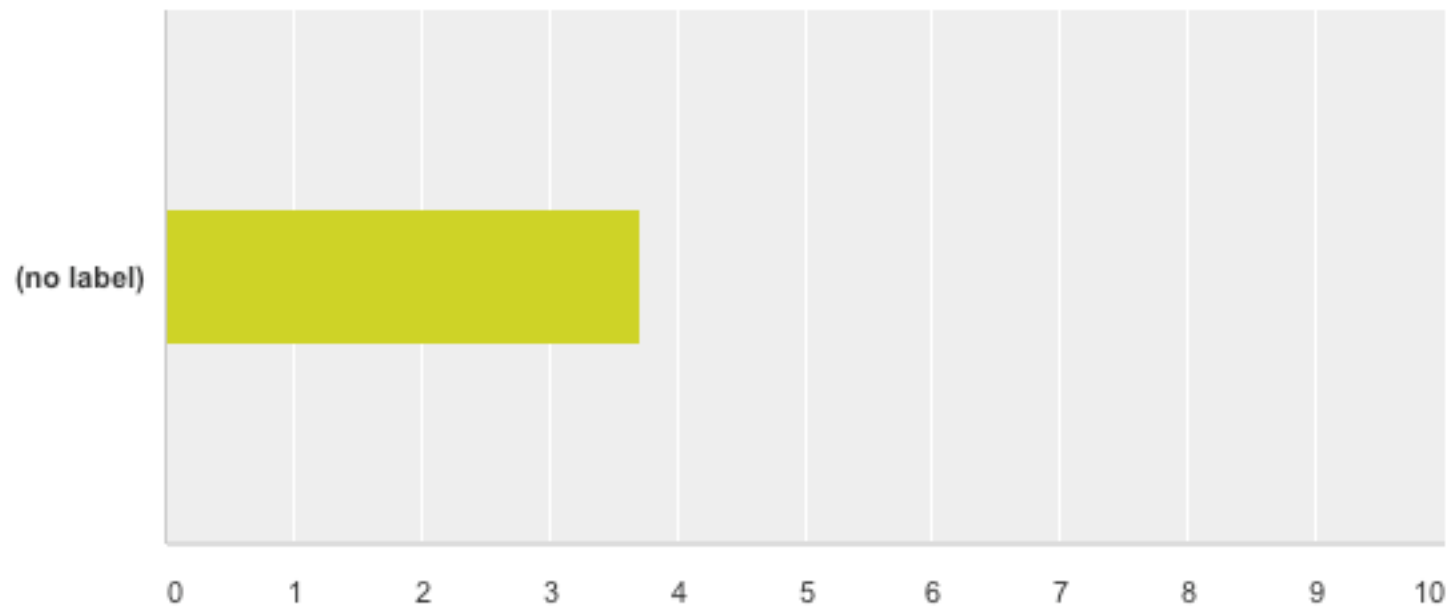


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(no label)	0.00% 0	0.00% 0	14.29% 1	57.14% 4	28.57% 2	7	4.14



**Board members share a common vision of what is best for the club now and in the future. Scale: 1=Strongly Disagree, 5=Strongly Agree**

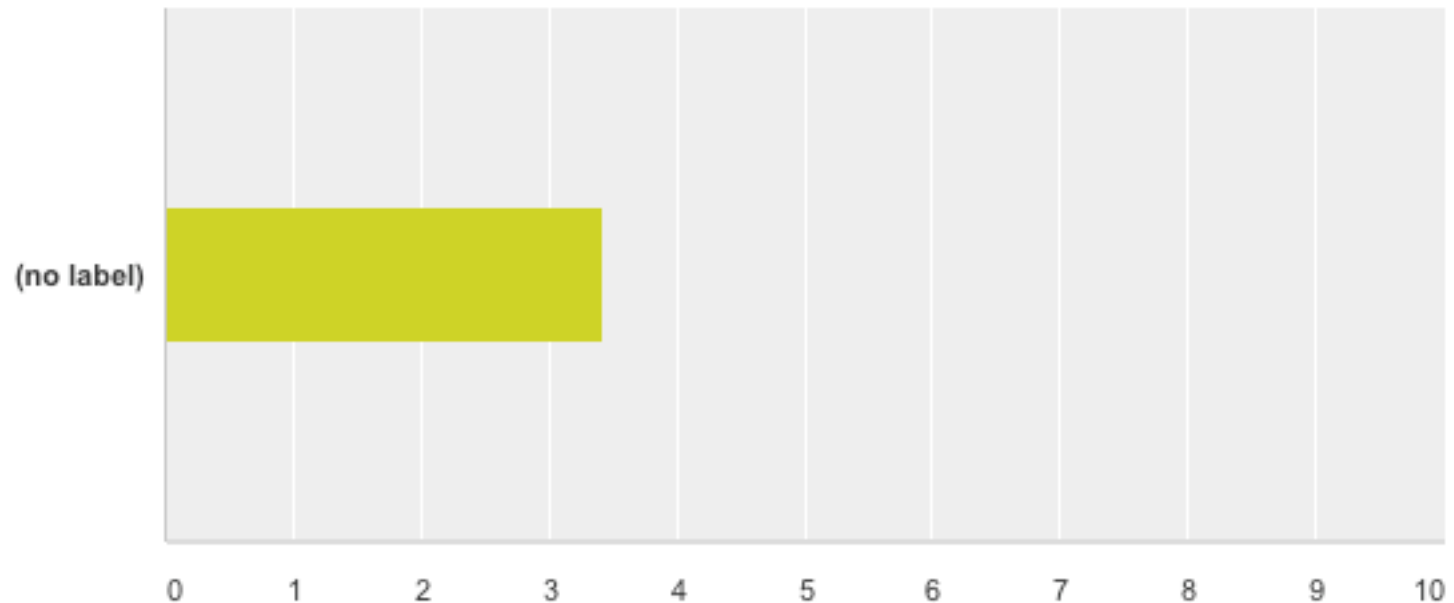
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	28.57% 2	71.43% 5	0.00% 0	7	3.71

# The board thinks and acts strategically. Scale: 1=Strongly Disagree, 5=Strongly Agree

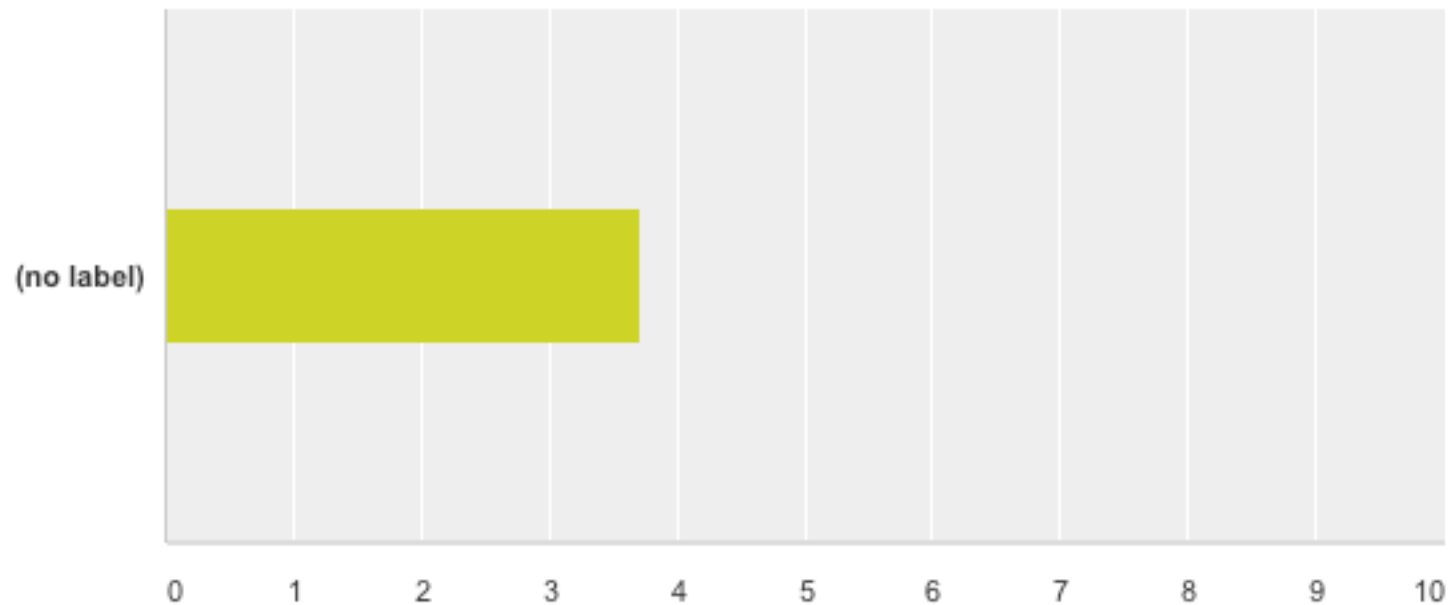
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	28.57% 2	57.14% 4	0.00% 0	7	3.43

**The content of board meetings is at an appropriate level for a governing body.**  
**Scale: 1=Strongly Disagree, 5=Strongly Agree**

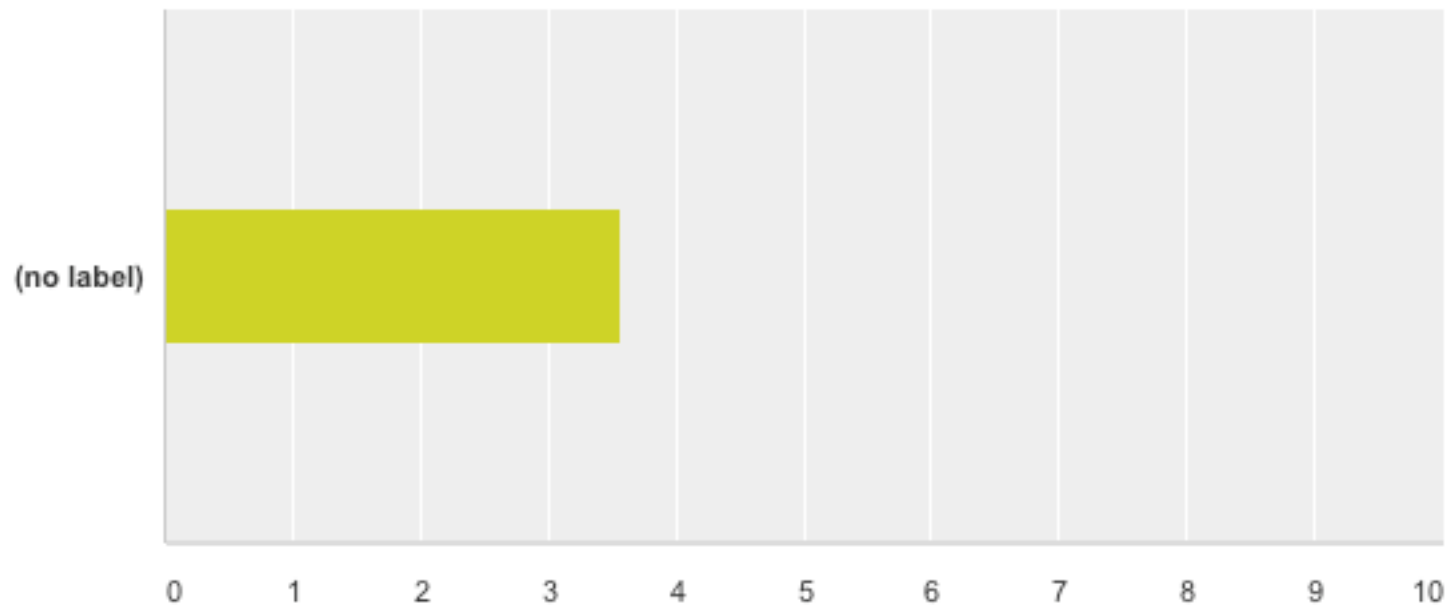
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	28.57% 2	28.57% 2	28.57% 2	7	3.71

**New board members are adequately briefed  
and equipped to contribute early in their  
term. Scale: 1=Strongly Disagree,  
5=Strongly Agree**

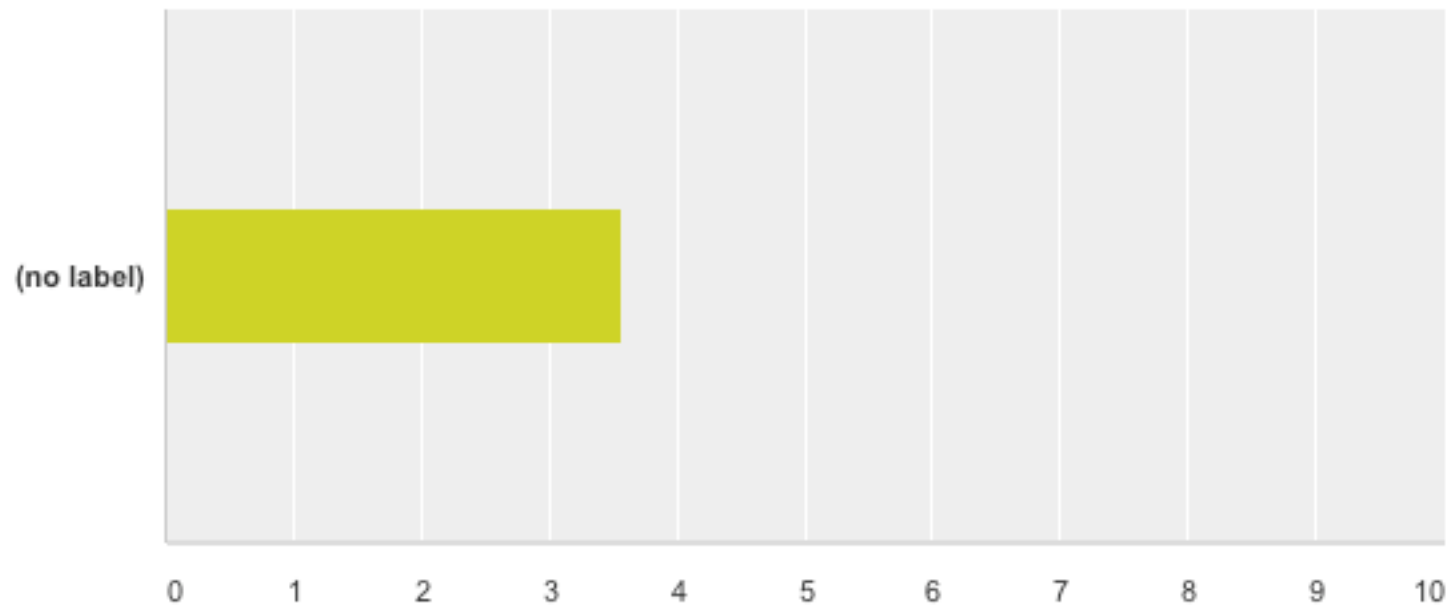
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	57.14% 4	28.57% 2	14.29% 1	7	3.57

**Committees are appropriately sized, include the right members, and have clear responsibilities. Scale: 1=Strongly Disagree, 5=Strongly Agree**

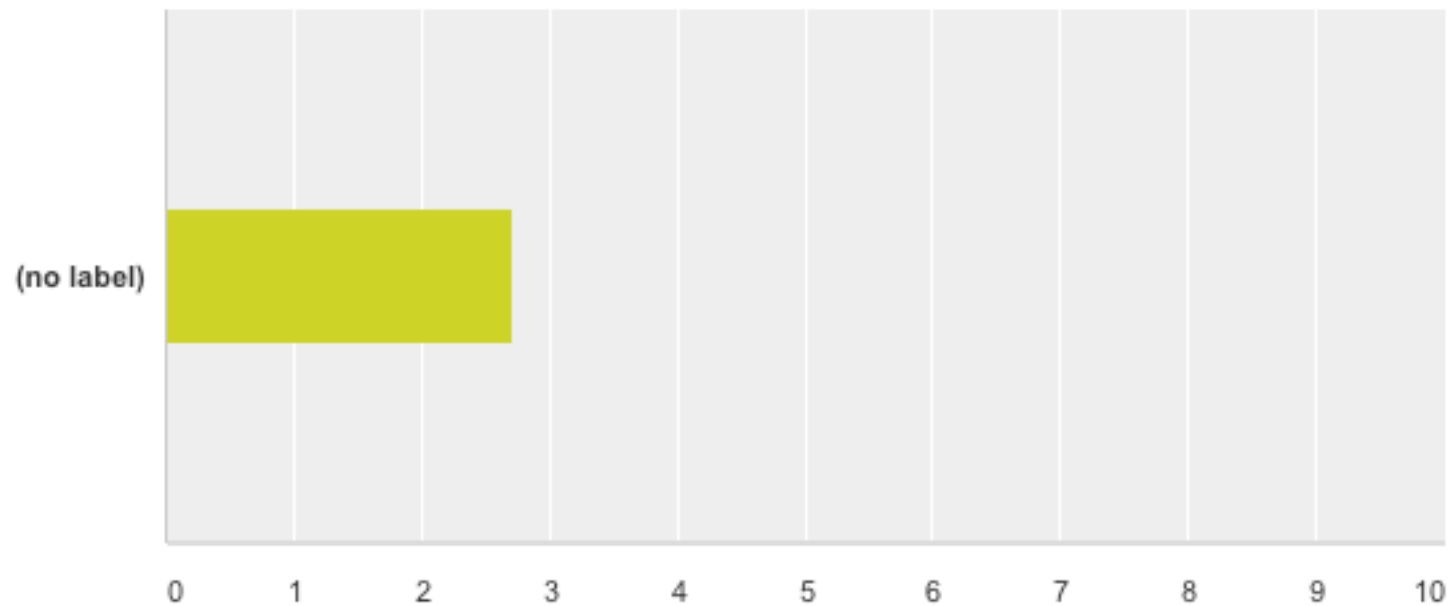
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	28.57% 2	42.86% 3	14.29% 1	7	3.57

**Committee reports are timely,  
comprehensive, succinct, and valuable.  
Scale: 1=Strongly Disagree, 5=Strongly  
Agree**

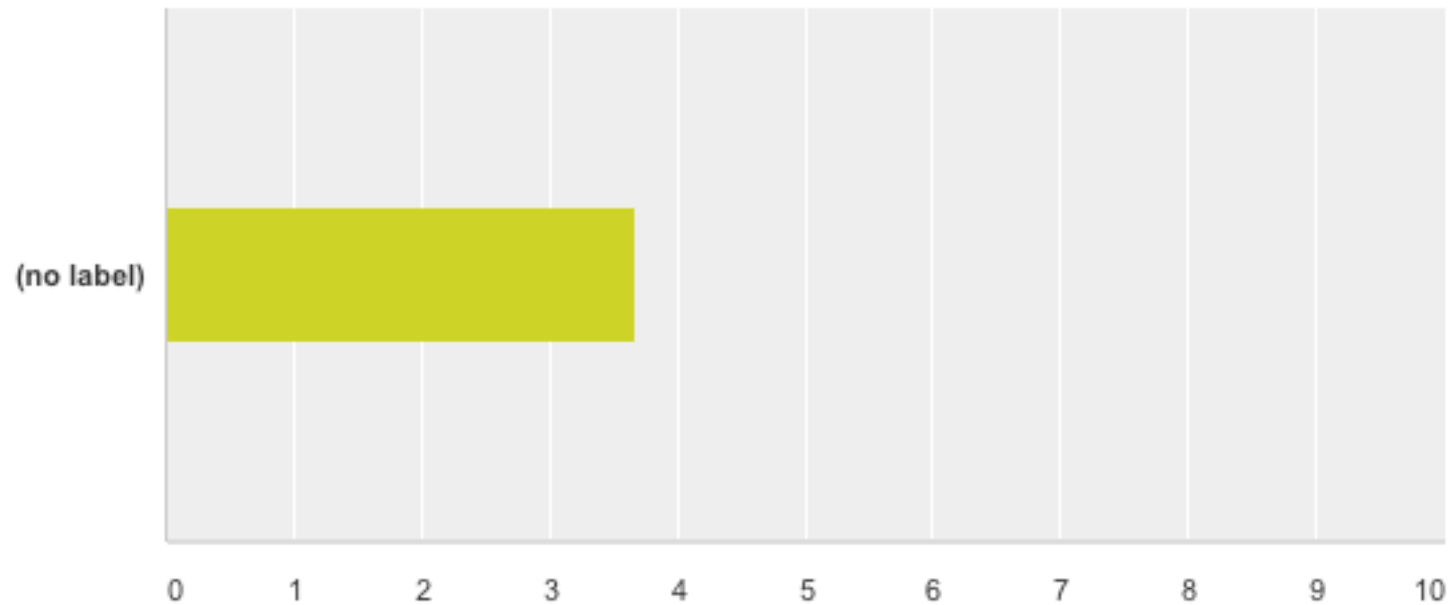
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	57.14% 4	28.57% 2	0.00% 0	14.29% 1	7	2.71

**There is a climate of trust on the board.**  
**Scale: 1=Strongly Disagree, 5=Strongly Agree**

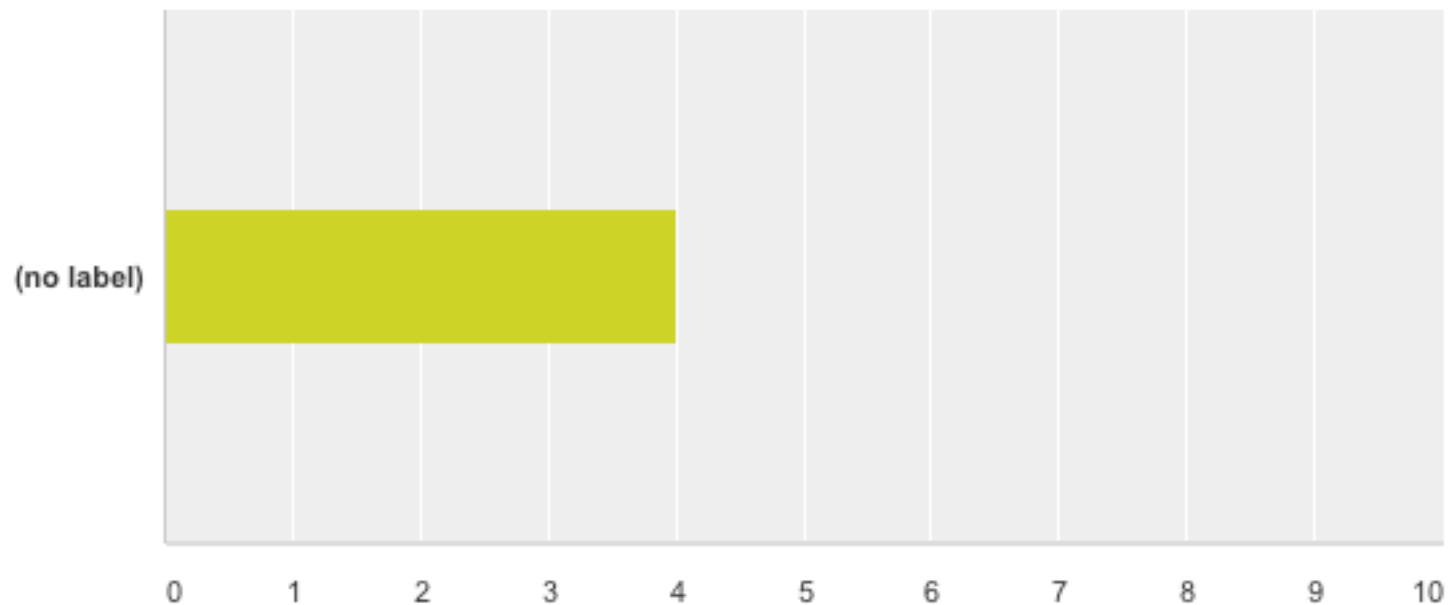
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	33.33% 2	66.67% 4	0.00% 0	6	3.67

# Board members support board decisions outside the boardroom, even when they disagree with them. Scale: 1=Strongly Disagree, 5=Strongly Agree

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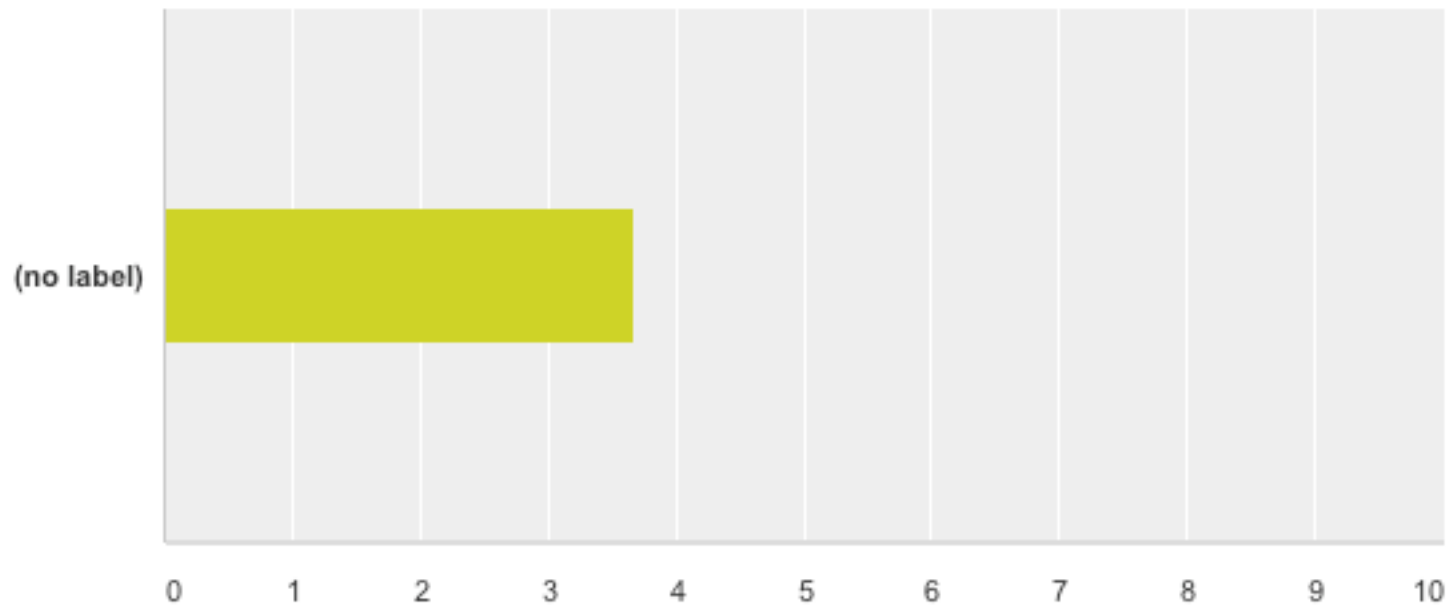


	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	28.57% 2	42.86% 3	28.57% 2	7	4.00



# Individual views of board members are respected by their colleagues.    Scale: 1=Strongly Disagree, 5=Strongly Agree

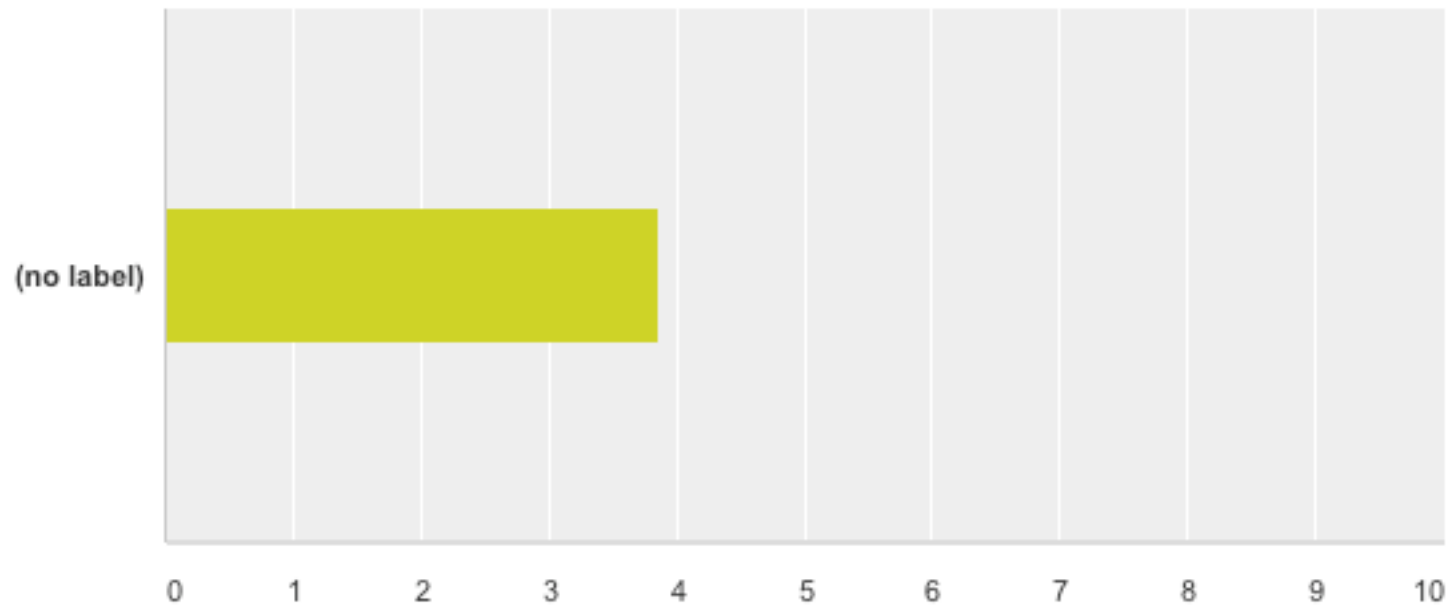
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	50.00% 3	33.33% 2	16.67% 1	6	3.67

**The Nominating Committee is provided appropriate guidance on the qualities needed for board candidates. Scale: 1=Strongly Disagree, 5=Strongly Agree**

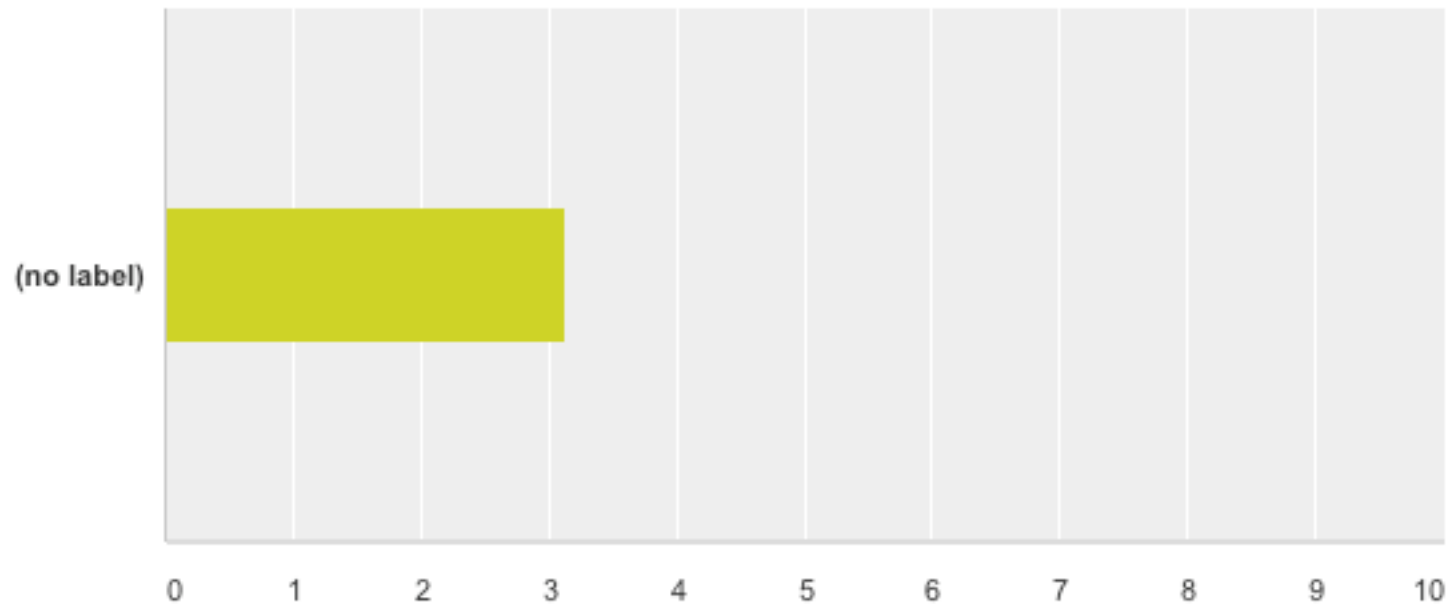
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	14.29% 1	42.86% 3	28.57% 2	7	3.86

**Board members respect confidential  
information outside of board meetings.  
Scale: 1=Strongly Disagree, 5=Strongly  
Agree**

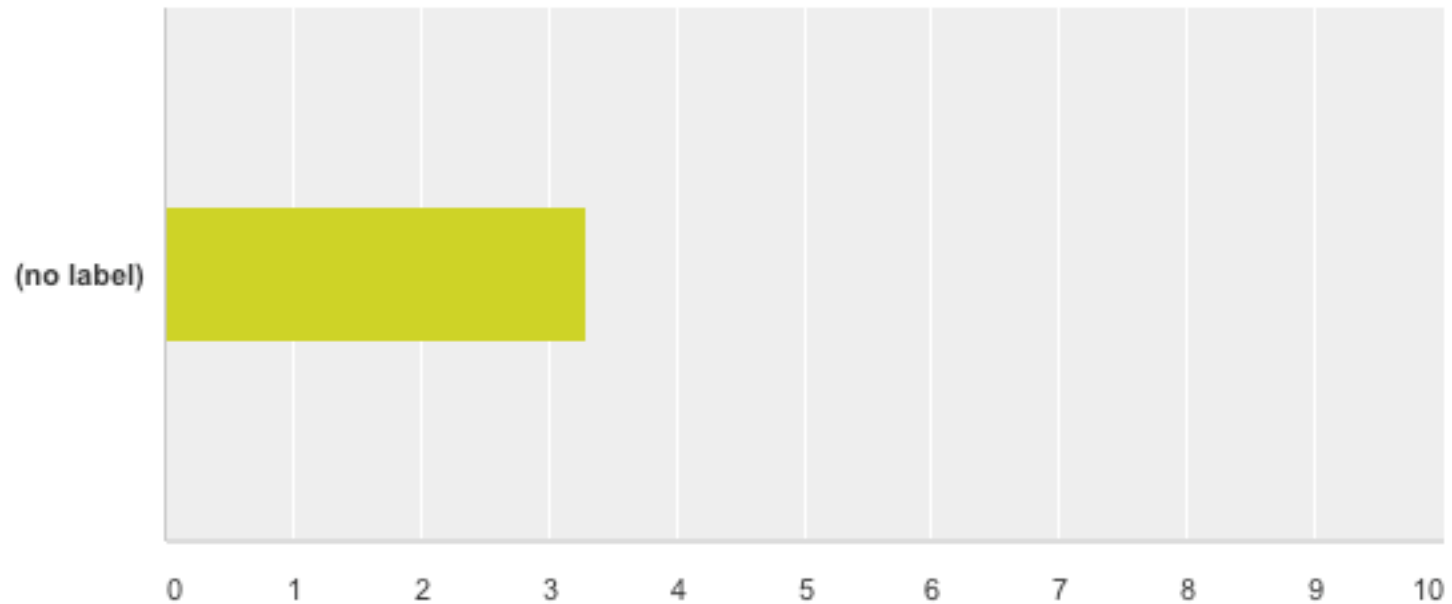
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	1	2	3	4	5	Total	Weighted Average
(no label)	14.29% 1	28.57% 2	14.29% 1	14.29% 1	28.57% 2	7	3.14

# Board meetings afford adequate time for a full discussion of issues. Scale: 1=Strongly Disagree, 5=Strongly Agree

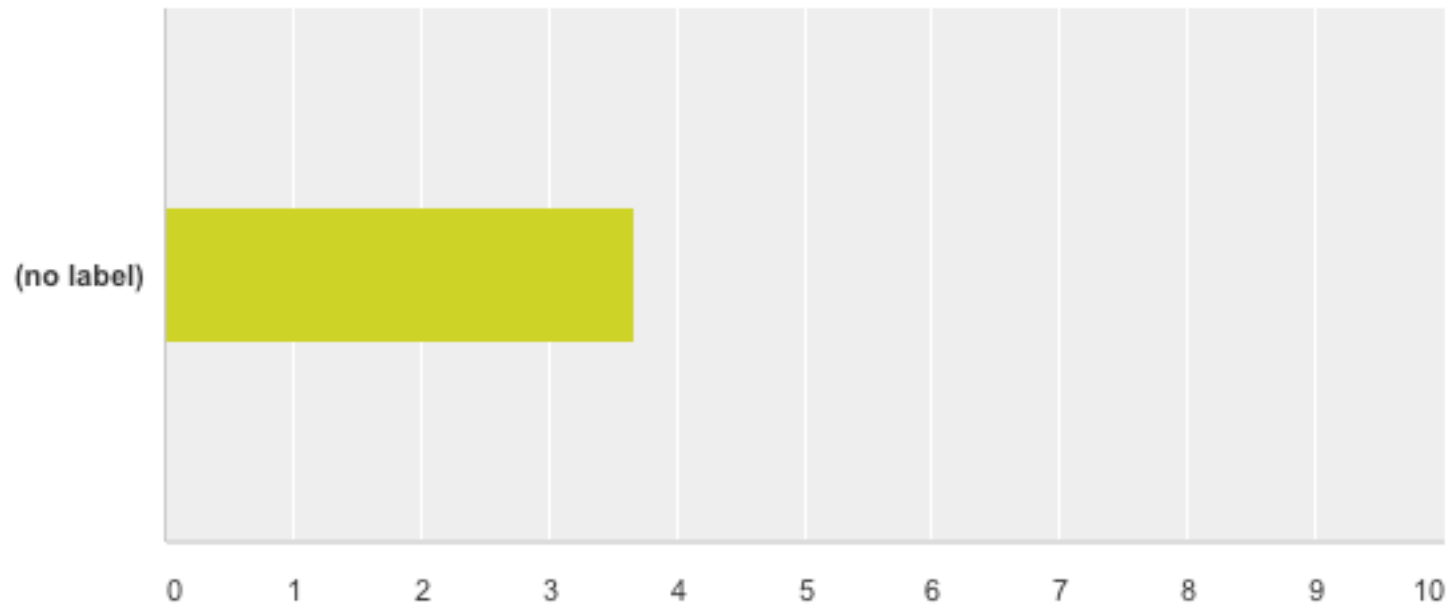
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	71.43% 5	28.57% 2	0.00% 0	7	3.29

# Board meetings are generally efficient. Scale: 1=Strongly Disagree, 5=Strongly Agree

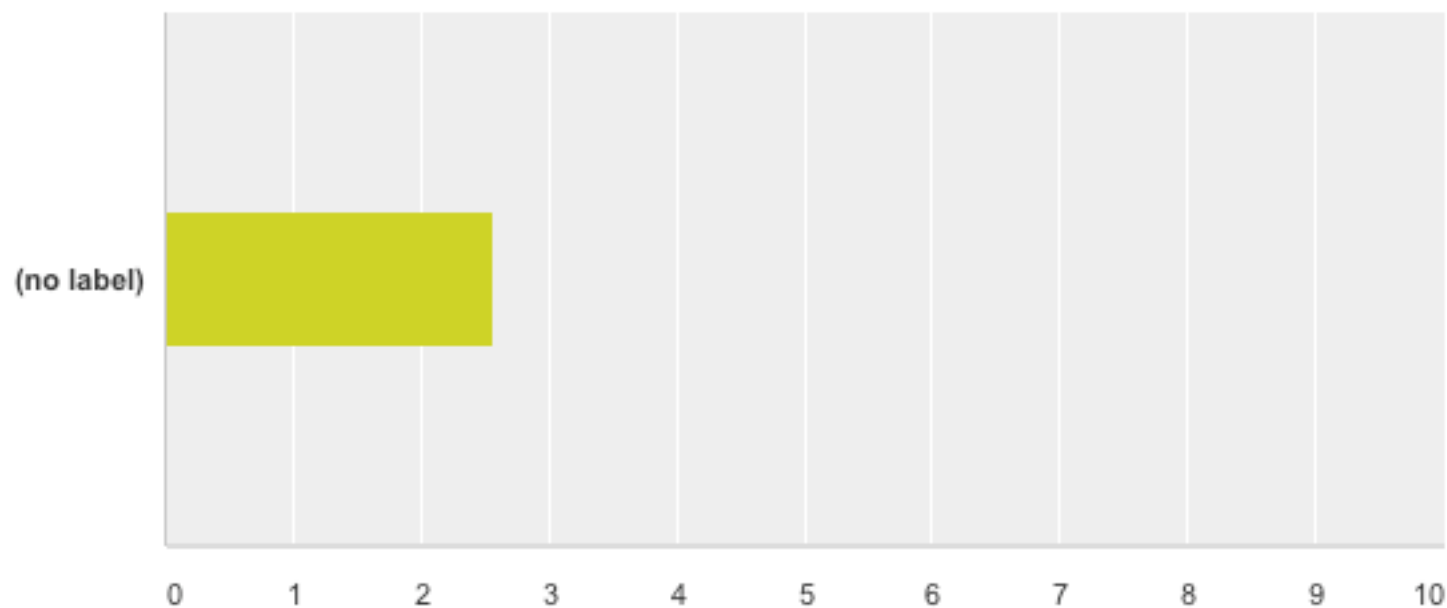
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	33.33% 2	66.67% 4	0.00% 0	6	3.67

**The board receives adequate training on governance principles and practices.**  
**Scale: 1=Strongly Disagree, 5=Strongly Agree**

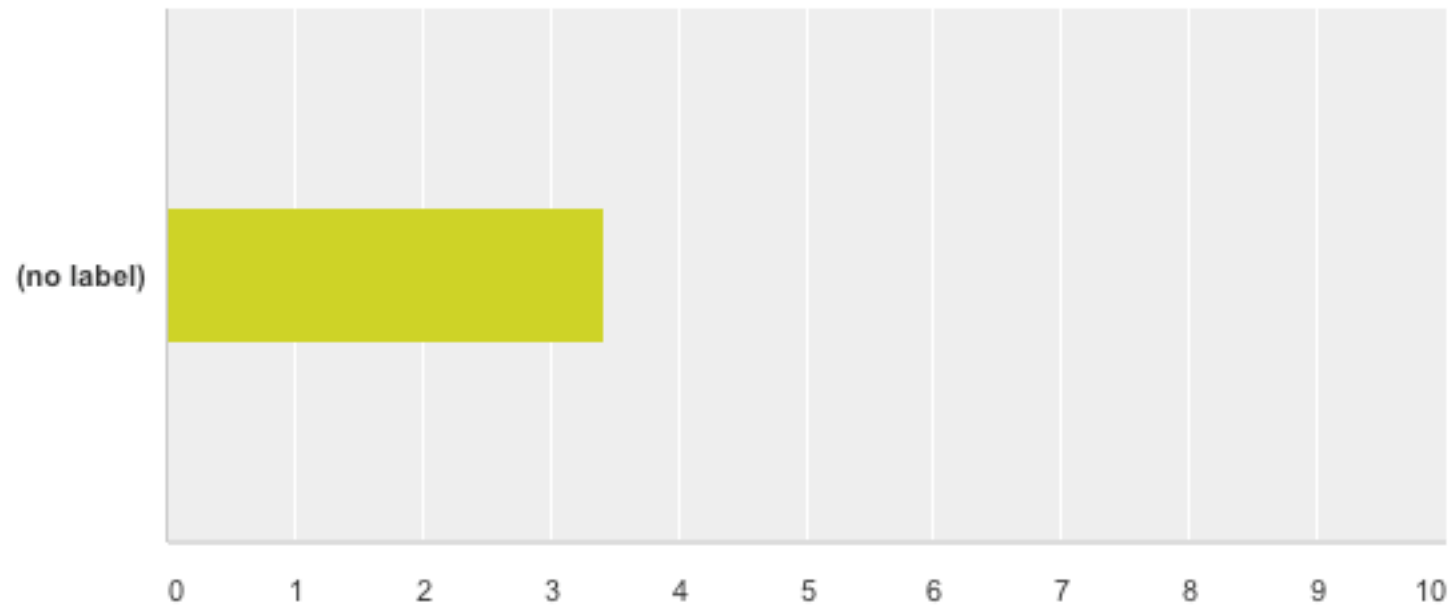
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	42.86% 3	57.14% 4	0.00% 0	0.00% 0	7	2.57

**Individual board members are held  
accountable for their performance.  
Scale: 1=Strongly Disagree, 5=Strongly  
Agree**

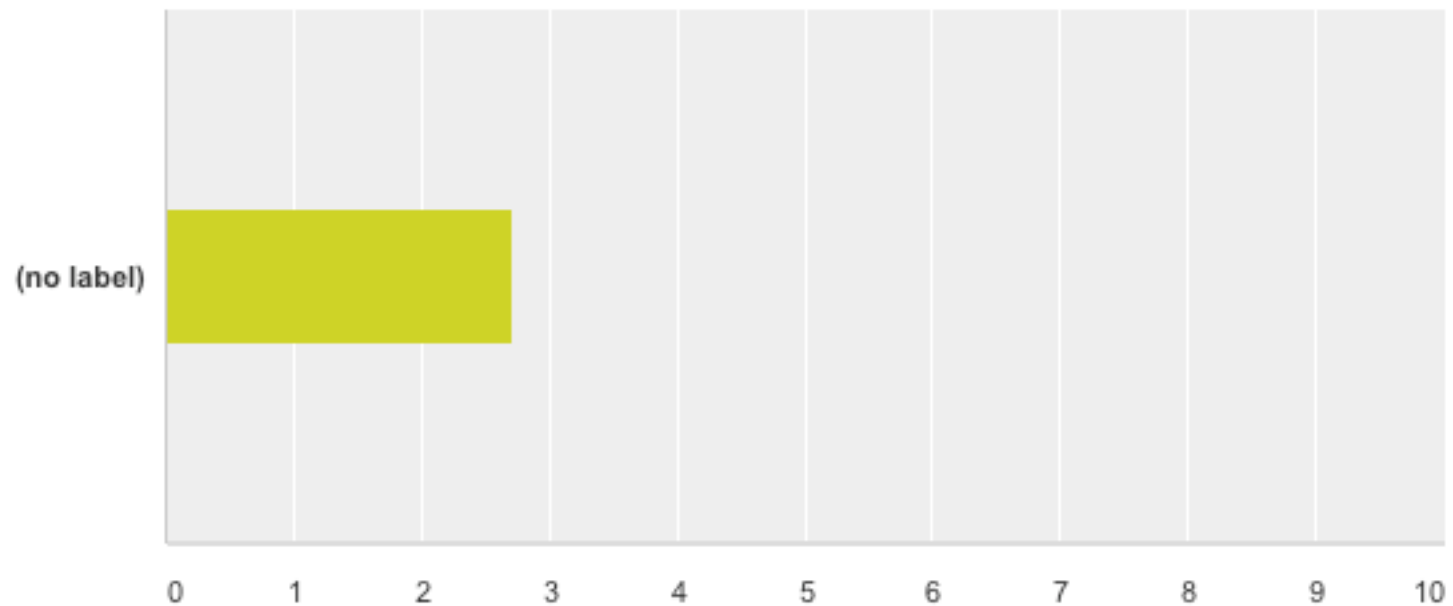
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	28.57% 2	57.14% 4	0.00% 0	7	3.43

**The board acts in accordance with its role  
as policy makers and not as operation  
implementers. Scale: 1=Strongly  
Disagree, 5=Strongly Agree**

Answered: 7 Skipped: 0

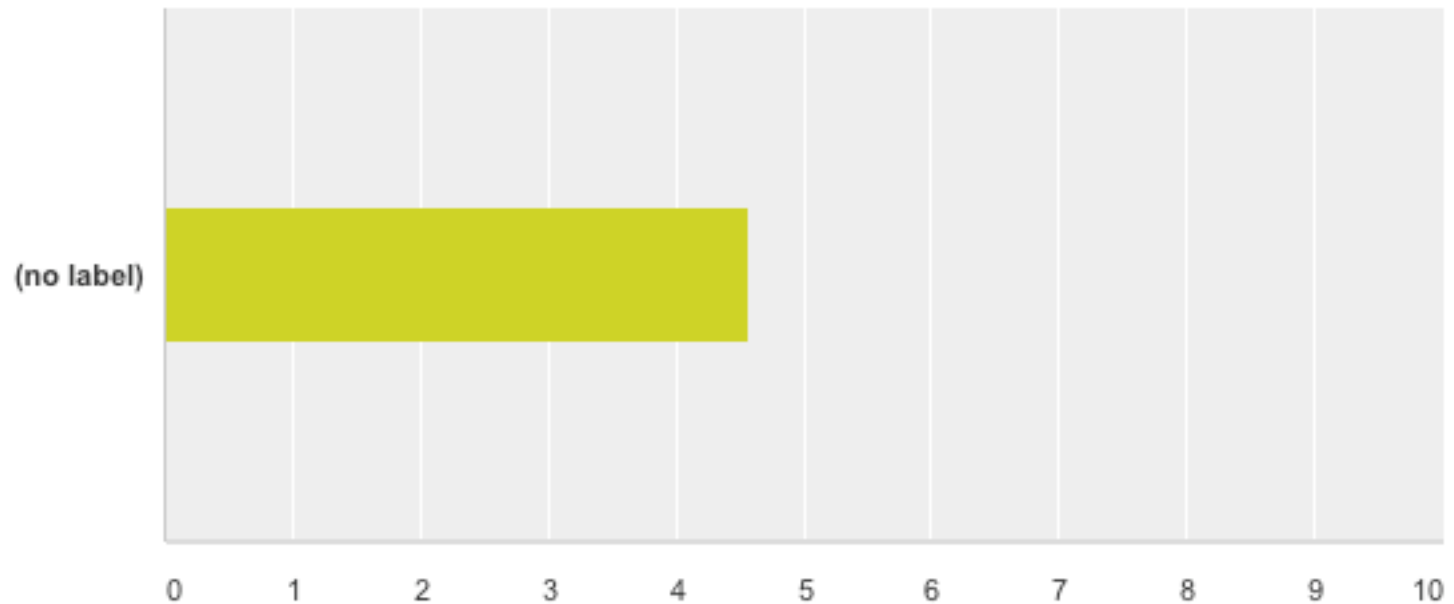


	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	28.57% 2	71.43% 5	0.00% 0	0.00% 0	7	2.71



**The board holds the GM accountable for  
accomplishing his/her objectives.    Scale:  
1=Strongly Disagree, 5=Strongly Agree**

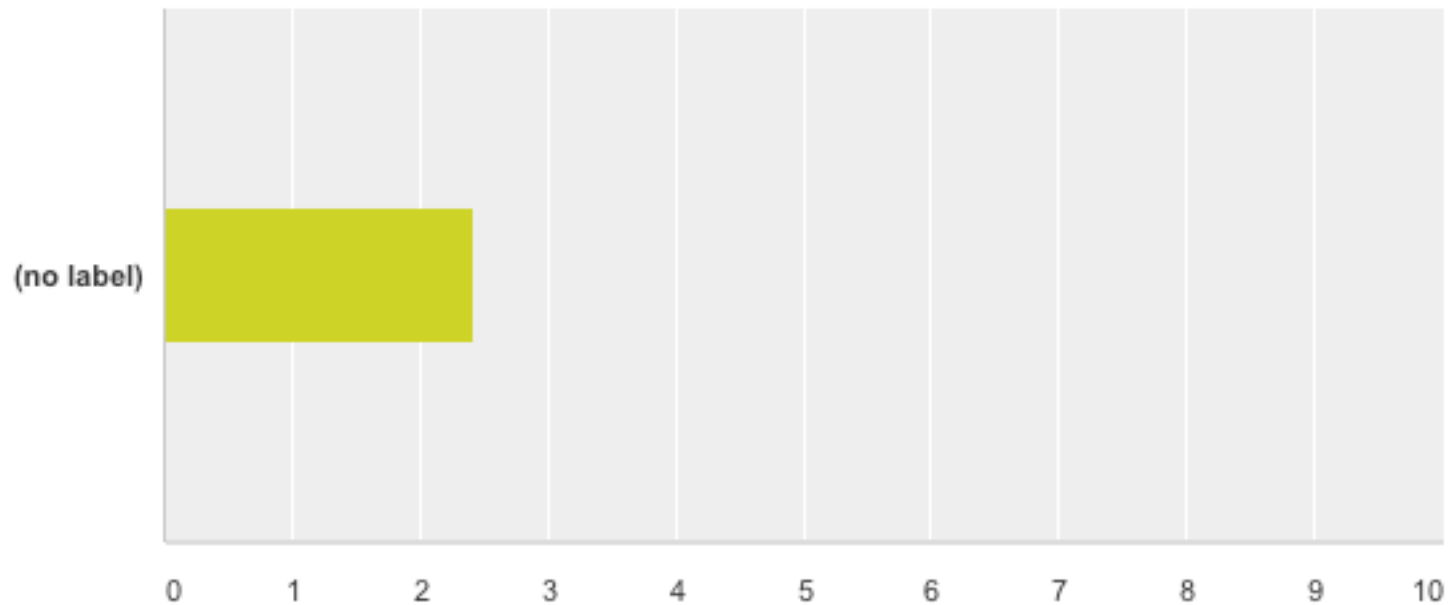
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	0.00% 0	42.86% 3	57.14% 4	7	4.57

**All board members understand the process  
for evaluating the GM's performance.  
Scale: 1=Strongly Disagree, 5=Strongly  
Agree**

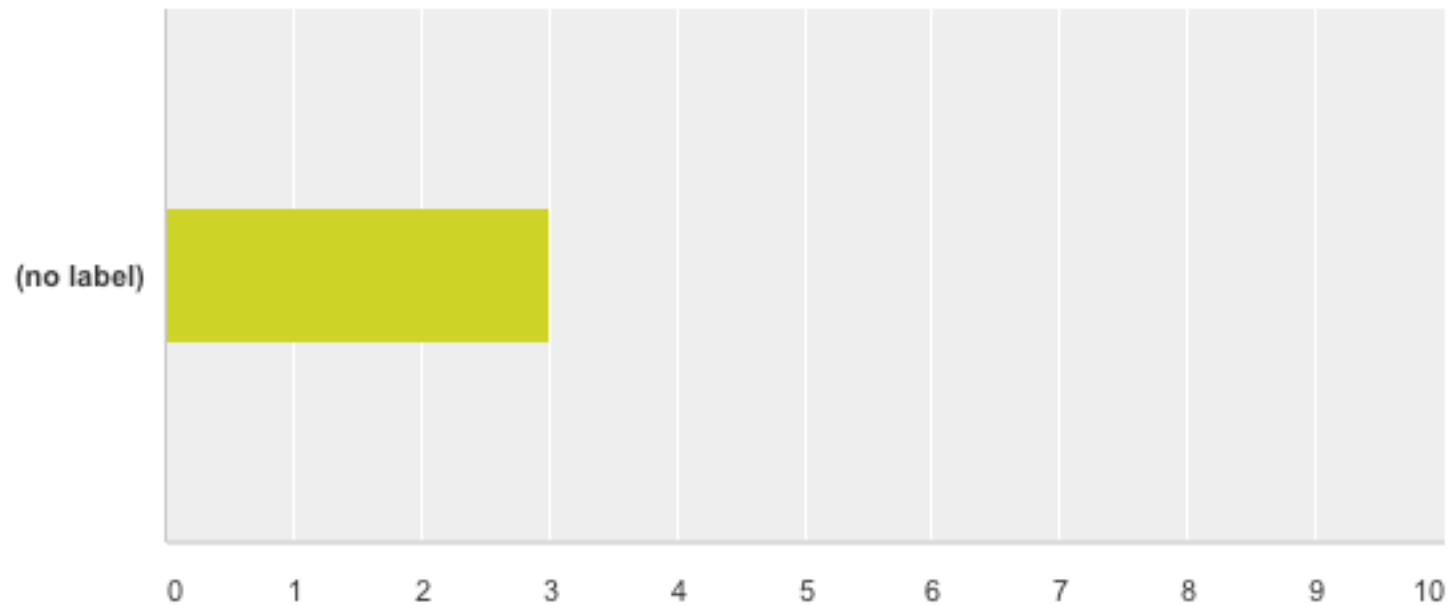
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	1	2	3	4	5	Total	Weighted Average
(no label)	14.29% 1	28.57% 2	57.14% 4	0.00% 0	0.00% 0	7	2.43

# The board's current process for evaluating the GM is appropriate and fair.    Scale: 1=Strongly Disagree, 5=Strongly Agree

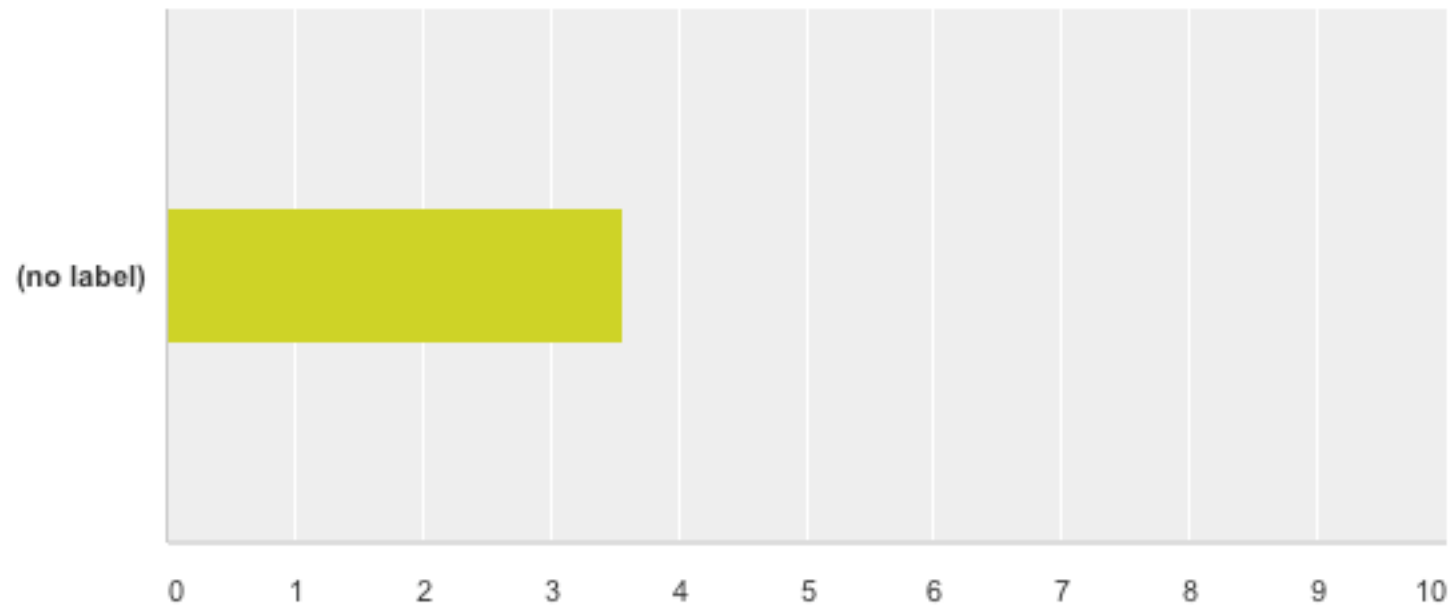
Answered: 7    Skipped: 0



	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	71.43% 5	14.29% 1	0.00% 0	7	3.00

**All board members have adequate  
opportunity to input their views regarding  
the GM's goals.    Scale: 1=Strongly  
Disagree, 5=Strongly Agree**

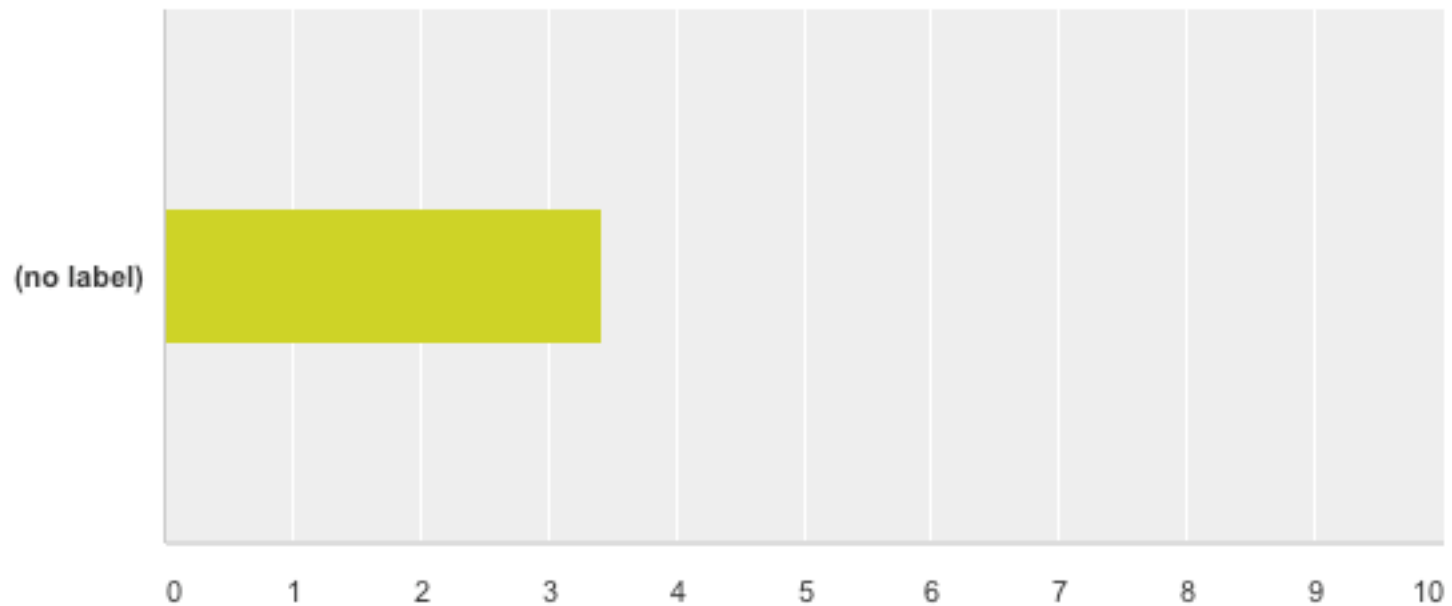
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	28.57% 2	42.86% 3	14.29% 1	7	3.57

The goals for GM evaluation appropriately reflect what is important for his/her role at the club.      Scale: 1=Strongly Disagree, 5=Strongly Agree

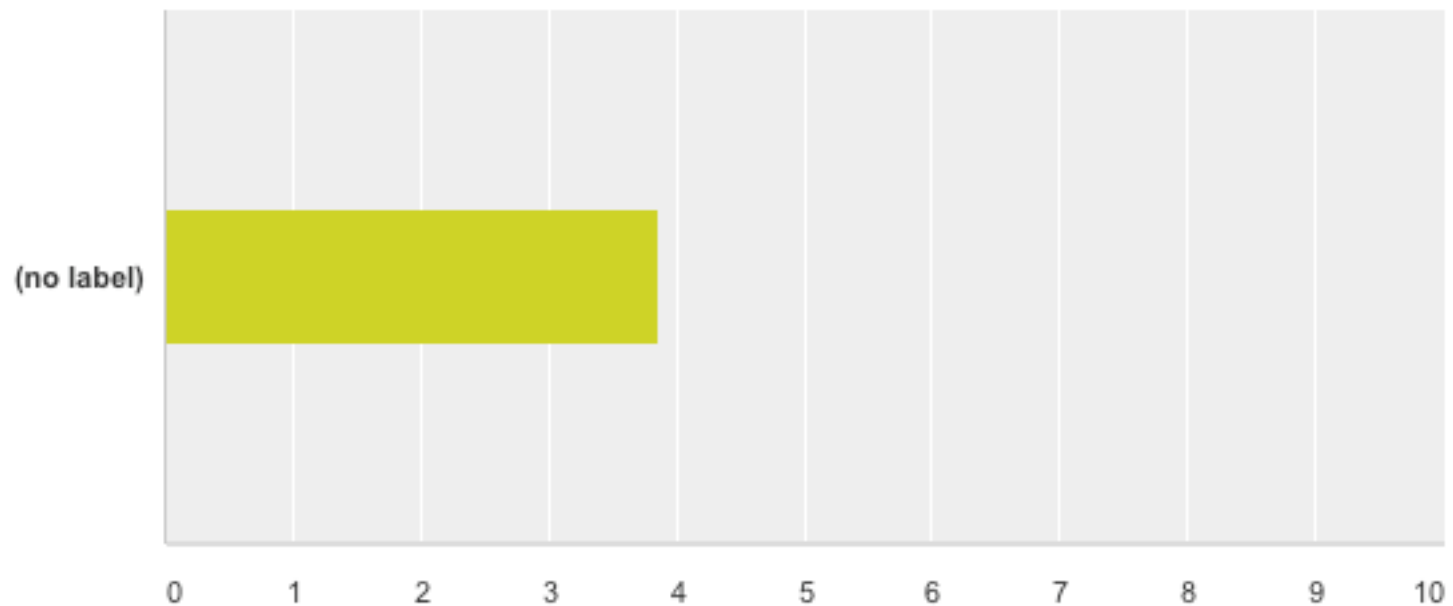
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	14.29% 1	42.86% 3	28.57% 2	14.29% 1	7	3.43

**The board receives timely information that  
is sufficient for it to monitor operational  
performance.    Scale: 1=Strongly  
Disagree, 5=Strongly Agree**

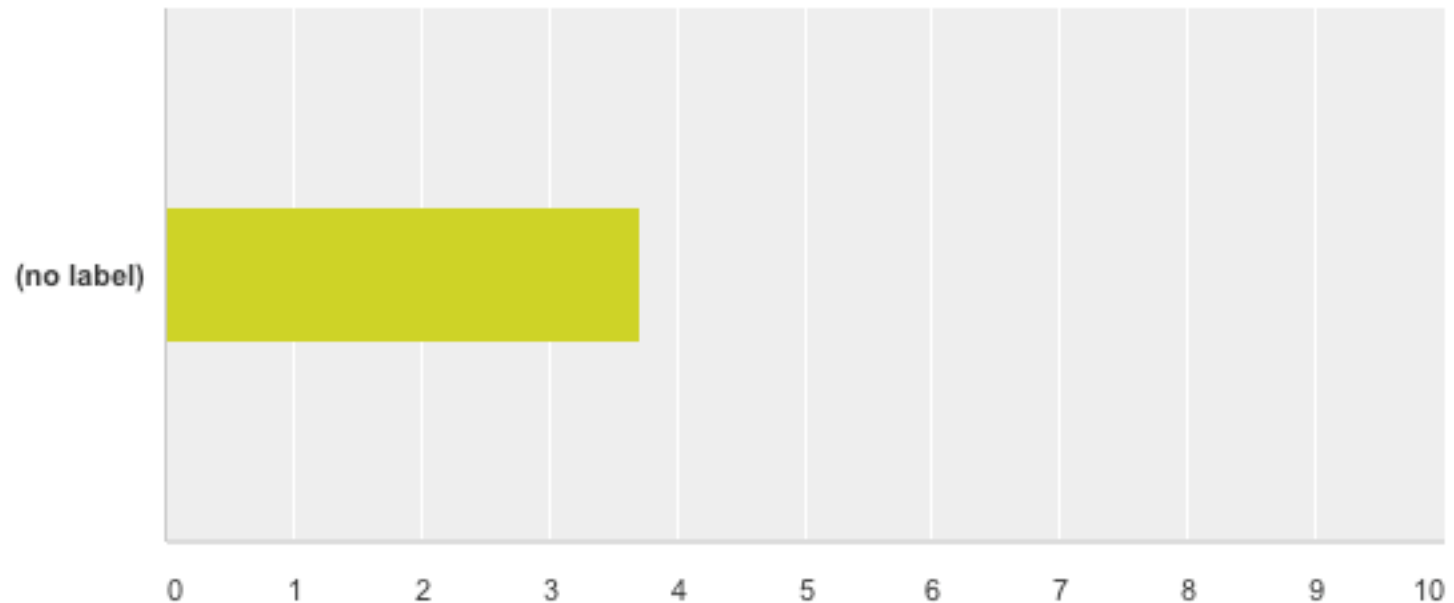
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	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	42.86% 3	28.57% 2	28.57% 2	7	3.86

# Overall the board is efficient and effective. Scale: 1=Strongly Disagree, 5=Strongly Agree

Answered: 7 Skipped: 0



	1	2	3	4	5	Total	Weighted Average
(no label)	0.00% 0	0.00% 0	28.57% 2	71.43% 5	0.00% 0	7	3.71

## To us, those “healthy” clubs generally have most of the following in common:

- Minimal politics and divisiveness among *both* members and staff
- Minimal confusion or strong “clarity” in mission, vision and core values, and strong EXECUTION to those standards---WE’RE ALL ON THE SAME PAGE!!
- High morale or satisfaction amongst both members and staff (we’re measuring it, not assuming or basing it on limited information)
- High efficiency – no longer doing things just ‘because that’s the way we’ve always done it’!
- They make difficult decisions when they need to be made, EVEN when they likely aren’t popular with some portion of the membership! (No longer is, “Not on my watch” mentality allowed)
- They are conscious about succession planning...volunteer and staff!
- A strong and thoughtful process of **communication and education** has been incorporated into the organization---with each key constituency—staff, members, board, committees, communities!



# Additionally, “Healthy Clubs” ....

**Continue a much greater focus on “running the club more like a business!”**

- Ensure appropriate ‘accountabilities’ are in place, both staff and volunteers Have clearly defined ‘targets;’ not shooting in the dark and hoping to hit something that finally ‘sticks!’
- Goals and objectives have been established; ‘agendas’ are being eliminated
- And, the Governance and Organizational Model of the club REALLY matter!

# And, “Healthy Clubs” seem to....

## Have “Shared Responsibility” for meeting goals and objectives

- The ‘Team’ has COLLECTIVE responsibility to the ‘big picture’ objective; ‘silos’ are not tolerated!
- Boards, Committees and Staff have clearly defined common objectives; one loud voice is not allowed to prevail
- Inappropriate behavior or motives are not allowed to dominate or become the ‘agenda’ driving the club
- And...

# Organizationally Healthy Clubs buy into the Sy Syms philosophy:

“An Educated Consumer is our  
BEST CUSTOMER!”

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What we believe from  
those visits is this:

Who of you joined your club  
with the expectation that you  
would “RUN” your club one day?

## In a Model Club...

Managers manage,  
Directors direct,  
Members enjoy!

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# What happens when this doesn't occur...

- Management/leadership turns over
- There is little or no Accountability
- Negative results and costs – both real and mental!
- Major Frustration for All!!!

# The Two Curses of Micro-Management

Good Manager Leaves  
Poor Manager Stays

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# Who or What is to Blame?

1. Lack of clearly defined roles for:
  - a. GM/COO
  - b. Club President
  - c. Board Members
  - d. Committee Chairs
2. Assertive Club President, Committee Chair or others “with an agenda”
3. Passive General Manager



# A number of clubs have told us...



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**“If the club had a general manager  
who was a leader, we wouldn’t  
have micro-management.”**

Ray Haik, President  
Midland Hills Country Club

**So, how does it all come together at  
successful, consistent, high  
member satisfaction Clubs?**

# Five Common Fundamental Strategies to this End!

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# Five Fundamental Strategies

- Clearly define the Roles and Responsibilities of Board and Committee Members; use an Activity/Decision Chart defining these Roles and Responsibilities
- Lead/Direct the Club with Action Plans
- Have Effective New Board and Committee Member Orientations
- “Magic” of the Mission Statement and supporting goals
- “Setting the Standards”/Norms and Expectations

# Defining the Roles and Responsibilities of Board and Committee Members

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# Roles and Responsibilities of Board Members

The primary functions of every board member:

- Approve membership applications and resignations if applicable.
- Review financial status of club; review and approve committee requests.
- Establish and review club policies and objectives; ensure compliance.
- Handle member discipline issues.
- Give a monthly report for the committee they chair.
- Hire the GM/COO; Dismiss the GM/COO.
- Participate in club activities when possible.
- Be a 'positive' influence with other members and set an example by abiding all club rules and policies.
- ***Develop long term goals and a strategic plan for the club; essentially making certain the club is able to perpetuate and that decisions are made in the greater interest of the membership!***

# Roles and Responsibilities of Committees/Chairs

- Roles and Responsibilities should be clearly defined AND memorialized.
- Committees should have specific objectives and tasks, be given clear guidelines and limitations, and held responsible/accountable for these goals.
- Committees are ADVISORY and cannot set policy, make operating decisions or commit club funds, but rather make RECOMMENDATIONS to the Board for action.
- In most clubs, committees have a vital role in communication conduit---from the Board to Members, from Members to the Board

# An Activity/Decisions Chart

A great tool to show who within the Club -- Board Members, Committee Chairs and Members, Management and Staff -- is responsible for every decision, policy or activity!



# SAMPLE Board, Committee and Management Roles and Responsibilities

Area/Department	Board	GM/COO	Department Heads	Committees
<b>Long Term &amp; Strategic Goals</b>	Develops in conjunction with mission and vision statements	Provides input	Provides input	Provides input
<b>Short Term Goals</b>	Monitors	Establishes and executes	Receives direction	
<b>Day-To-Day Operations</b>	No Role	Makes all management decisions	Manages department	No role
<b>Budget</b>	Approves	Recommends budget to Board	Prepares with GM	Make recommendations
<b>Capital Purchases</b>	Approves	Prioritizes requests for Board approval	Prepares request	Make recommendations
<b>Decisions on Building Renovations and Expansions</b>	Makes decisions that are based on mission and vision statements	Provides input If authorized, signs and executes contracts	Provides input at Committee level	Makes recommendations
<b>Supply Purchases</b>	Sets policy/approves budget	Reviews and approves	Purchases according to policy and budget	No role
<b>Emergency Repairs</b>	Works with GM and acts with concurrence from Chair	Notifies Executive Committee for immediate approval and notifies Board	Communicates need to GM	No role
<b>Fees</b>	Adopts policy	Develops fee schedule with Board input	Provides input	May recommend
<b>Hiring Staff</b>	No role	Approves all hiring	Interviews direct reports	No role
<b>Staff Deployment and Assignment</b>	No role	Establishes and executes	Follows club policy	No role
<b>Personnel Policies</b>	Adopts policy	Recommends/administers	Follows club policy	No role
<b>Staff Salaries</b>	Allocates line item for budget	Approves salaries and recommendations from supervisory staff	Makes recommendation to GM	No role
<b>Staff Evaluations</b>	Evaluates ONLY the GM	Evaluates all department managers and may seek Board input	Evaluates all direct reports	No role
<b>Membership Growth &amp; Marketing</b>	Works with GM to develop strategy Approves members	Works with Board to develop strategy and implements	Make recommendations and carries out strategy	Provide input

# AAC's Roles and Responsibilities



DRAFT

## ATLANTA ATHLETIC CLUB ROLES AND RESPONSIBILITIES

Area/Department	Board	GM/COO	Department Heads	Committees
Long Term & Strategic Goals	Develops in conjunction with mission and vision statements	Provides input	Provides input	Provides input
Short Term Goals	Monitors	Establishes and executes	Receives direction	
Day-To-Day Operations	No Role	Makes all management decisions	Manages department	No role
Budget	Approves	Recommends budget to Board	Prepares with GM	Make recommendations
Capital Purchases	Approves	Prioritizes requests for Board approval	Prepares request	Make recommendations
Decisions on Building Renovations and Expansions	Makes decisions that are based on mission and vision statements	Provides input If authorized, signs and executes contracts	Provides input at Committee level	Makes recommendations
Supply Purchases	Sets policy/approves budget	Reviews and approves	Purchases according to policy and budget	No role
Emergency Repairs	Works with GM and acts with concurrence from Chair	Notifies Executive Committee for immediate approval and notifies Board	Communicates need to GM	No role
Fees	Adopts policy	Develops fee schedule with Board input	Provides input	May recommend
Hiring Staff	No role	Approves all hiring	Interviews direct reports	No role
Staff Deployment and Assignment	No role	Establishes and executes	Follows club policy	No role
Personnel Policies	Adopts policy	Recommends/administers	Follows club policy	No role
Staff Salaries	Allocates line item for budget	Approves salaries and recommendations from supervisory staff	Makes recommendation to GM	No role
Staff Evaluations	Evaluates ONLY the GM	Evaluates all department managers and may seek Board input	Evaluates all direct reports	No role

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# Addison Reserve's Accountability Matrix

Michael McCarthy, Club Executive of the Year 2010  
Fernando Leal, Club President of the Year 2011

**CLUBHOUSE PROJECT ACCOUNTABILITY MATRIX**

Conceptual and schematic design phase	Owner's Rep	General Manager	Executive Committee	Board
Review and approve schematics for design development	Analyze	Recommend	Review	Approve
Review and approve scope changes (ongoing)	Analyze	Recommend	Review	Approve
Discuss value engineering to meet budget guidelines (ongoing)	Recommend	Approve	--	--
Establish legal review and contract signing process	Analyze	Review	--	Approve
Review / approve contracts for owner's rep, architect and interior design	Analyze	Recommend	Approve	Be informed
Select a general contractor to serve as preconstruction advisor	Recommend	Review	Approve	Be informed
Approve loan agreements	--	Review	--	Approve
Review and approve budget changes/use of contingency (ongoing)	Recommend	Recommend	Review	Approve
Establish change order maximums	Recommend	Recommend	Review	Approve
Change order monitoring	Analyze	Approve	Be Informed	Be Informed
Set up insurance and legal needs	--	Review	Approve	Be Informed
Review staging plan to achieve minimal disruption to membership 5/10	Analyze	Recommend	Review	Approve
Preliminary construction budget	Analyze	Recommend	Review	Approve
Communicating to members	Analyze	Approve	Be Informed	Be Informed

Note: Scope change— Adding or deleting square footage or function not originally approved.

**In many of the highest performing clubs, except when asked for advice from a department head or the GM/COO, Committees have no day-in, day-out management role or responsibilities.**

# ACTION PLANS

Boards that USE their Committees through Action Plans don't bog down in minutiae at their meetings and can focus on "Big Picture" governing policies and issues.

***If the Board is typically spending more than 15 minutes on an operating issue, or meetings are too long....***

it likely needs...

# A COMMITTEE ACTION PLAN

The Club needs to address the issue of denim in the clubhouse and on the golf course.

GM/COO places the issue on House Committee Agenda.



House Committee meets and concurs with GM/COO to survey how other comparable clubs have resolved this issue.



House Committee and GM/COO review various policies and proposals and prepare recommendation for the Board.



GM/COO prepares report to be reviewed by House Chairperson and then presented to Board for agenda inclusion.



GM/COO and House Chairperson presents new policy proposal as part of the House Committee report to the Board.



Board votes on recommendation.



Approved, denied or returned to Committee for redrafting.

**It is critical that the Board allows a  
Committee time to respond to  
changes they make to a Committee  
recommendation.**

# The “Magic” of the Mission Statement and Supporting Goals

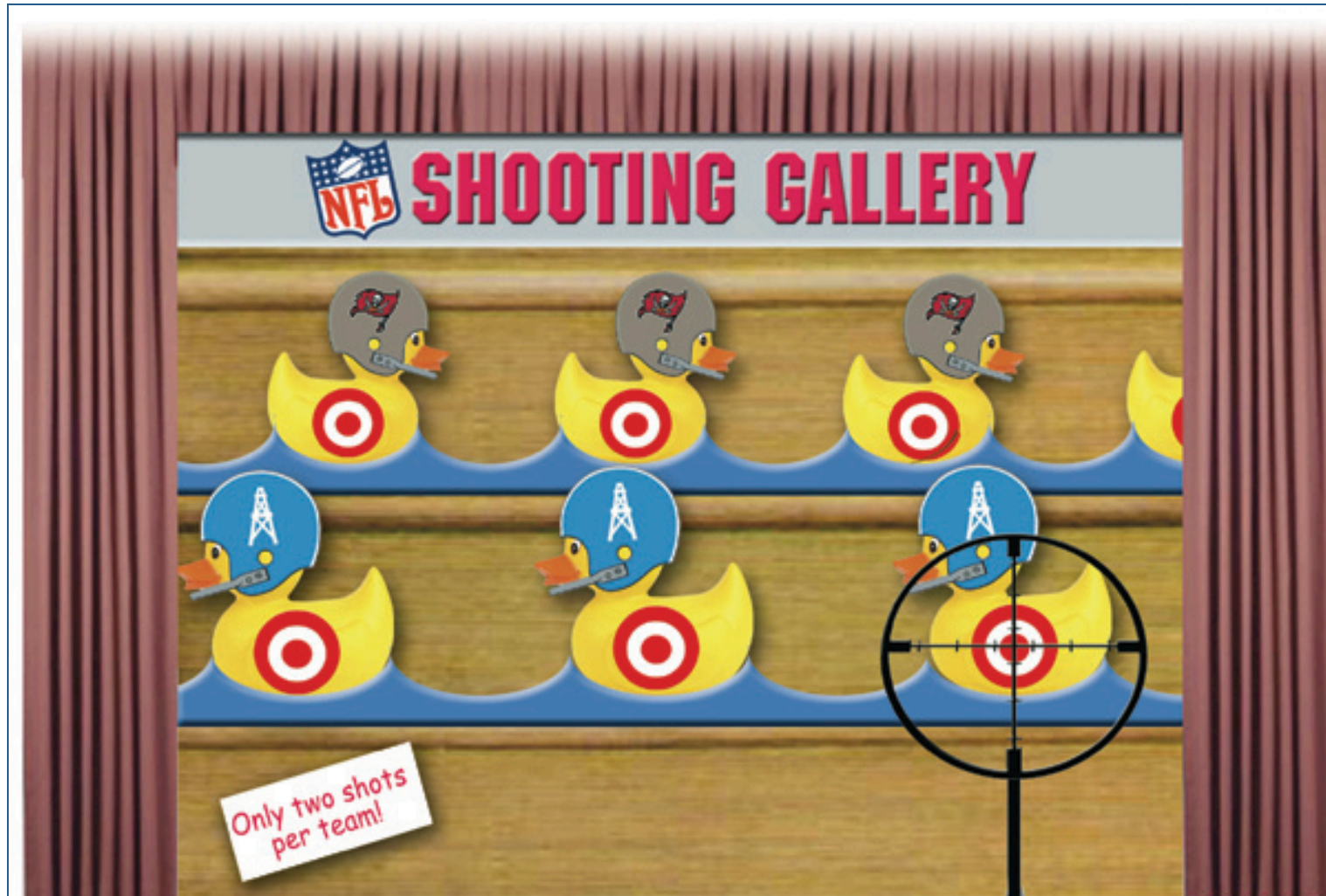
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# Which target are you shooting for?



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## **Your Mission Statement needs to be part of everything you do as a Club...**

- On the front page of your Board and Committee Books
- On your website for all to see!
- On the tag line of your Newsletter
- At the front door of your Clubhouse
- On the employee business cards
- On your member statements
- And, be the measure against which all your decisions are made!

**Club Boards and Committees must keep  
in mind the overall  
*“Mission Statement/Vision Statement/  
Core Values”*  
of the Club when carrying out their  
respective responsibilities.**

# **“Setting the Standards” Norms and Expectations**

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**“Model Club Boards have set the standards  
and developed the mores  
and culture of their clubs...  
how they expect Members, Committees,  
Staff and Themselves to behave and perform  
in order to ‘protect’ their unique  
Brand and Mission.”**

# One Club President's story of 'Setting the Standards'

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# Proposed Norms and Expectations

- Focus on policy/strategy vs. operations
- One person speaks at a time
- No more than 3 minutes per person (appoint a timekeeper)
- No side conversations
- Absolute confidentiality -- zero tolerance
- Try our best to reach a good decision and stick with it after we leave --minimize second guessing
- United front out of the board room
- Read board books and publications in advance to save time at meetings -- be prepared
- Stick to agenda (USE PARKING LOT)
- No single person agendas

# New Board and Committee Member Orientation Process

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# Model Clubs take the Board and Committee Orientation Process very seriously!

Premise: If you agree to be nominated, are elected and agree to serve on the Board or a Committee, you must make a commitment to supporting the Mission and understanding the Expectations and Environment you now have a responsibility to Participate or Govern!

# For Board Members

- They typically spend at least a half day to review the Board Policies Manual, the Strategic Plan, and tour ALL of the facilities -- led by both the GM/COO and President.
- Board Orientation Process is also an opportunity to pay tribute to the Team responsible for day to day operational success.
- A new Board Member **MUST BE AWARE OF ALL OF THE CLUB' S ASSETS, BOTH PHYSICAL AND STAFF**, as well as further understanding culture and expectations of the role.

# Committee Members and Chairs....

- Roles & Responsibilities, which are clearly defined AND memorialized, are reviewed in detail at the start of each Committee year.
- Specific objectives and tasks are identified for the year and all are given clear guidelines and limitations, and held responsible/accountable for these goals.
- Committees goals should all be evaluated against the Club's "Mission Statement" before final approval.

# Committee Members and Chairs....

- It is made clear and reiterated continuously that Committees are ADVISORY and cannot set policy, make operating decisions, commit club funds or deploy club personnel.
- The GM/COO and Club President review these Expectations at the beginning of each newly constituted Committee year.
- Like the Board, when appropriate, Committees tour and understand the assets, both physical and staff that are part of the Committee purview.

**“I wish we could take the entire  
membership through this  
orientation.”**

***Bill Bennett, President***

**Paradise Valley Country Club**

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# **And, to effectively ‘work,’ the Orientation Process CANNOT BE DISCRETIONARY!**

The GM/COO and Board President  
preside and ‘own it,’ but ALL are  
committed to participating.

# Most of the highest performing clubs we see use the 'education model' in all they do.....

Prospective members, new members, prospective staff, new staff, prospective and new Board and Committee members.

# Other Model Club Practices

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# All Standing Committees are Chaired by a Board Member

The Board Member/Committee Chair, working in conjunction with the GM and Department Head, are better equipped to control and 'manage' the agenda, and ultimately ensure that the Committee and its recommendations are effectively communicated and followed up on with the Board.

**One of the functions of the committee organization in a club is to provide appropriate observation of club members for the potential recruitment of future Board Members.**

**Presidents serve more than one year  
terms, or there is at least a clear  
understanding of the accession of  
officers each year!**

# Who should serve on Committees?

**“Get the Right People  
on the bus!”**

Jim Collins, “Good to Great”

# Considerations

When considering members to be asked to serve on a particular committee, the following should be considered:

- Is this person generally considered as having a well-thought out and logical approach to decision-making?
- Does this person seem to have the Club's best interest in mind, or a self-serving motive?

**What is the criterion that  
makes a good member of the  
Board of Governors?**

# Begin with the end in mind.

What are the expectations we have of someone serving as a member of the Board of Governors?

Moreover, the people running for the Board must have a clear understanding of what their roles as Governors are going to be.

Do they support the ‘Mission’ of the Club?

**Who the Nominating Committee puts forward to the Membership for Board positions, whether contested elections or not, *may have a significant and prolonged effect, both positive and negative, on the Club's future well-being.***

It must be a deliberate, thoughtful and very considered process!



## Do candidates meet and/or understand this basic ‘test’?

### Three primary ‘legal’ duties of a Board member:

1. **Duty of care** - Board members must take the same precautions in governing the club that an “ordinarily prudent” person would take.
2. **Duty of loyalty (or good faith)** - Board members must put the interests of the club ahead of their own personal interests
3. **Duty of obedience** - Board members must remain faithful to the mission of the club.

## Sample Board Profile

### What Is Our “Ideal” Board Profile?

	Least One Person in Each Category Below	Governors Who Have	Prospects Who Have
<b>A.</b>	Experience on a club or non-profit board		
<b>B.</b>	Legal expertise		
<b>C.</b>	Financial expertise		
<b>D.</b>	Hospitality expertise		
<b>E.</b>	Public relations and media experience		
<b>F.</b>	Respected community business professional		
<b>G.</b>	Real Estate and local zoning knowledge		
<b>H.</b>	Construction and building experience		
<b>I.</b>	Turf and golf experience		
<b>J.</b>	Strategic planning expertise		
<b>K.</b>	Other (Specify)		
<b>L.</b>	Other (Specify)		

**Who is leaving the Board? What categories need to be filled?**

# The “No Horshack” Rule



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**Should the GM/COO have any  
input into the process or selection  
of candidates?**

# And, Model Club Nominating Committees... “RECRUIT”

the best and most appropriate talent to  
serve on the Board; those who simply  
have the overall Best Interests of the  
Club, not themselves, in mind!

**Simply put, no one should be  
proposed for the Board who you  
wouldn't want to one day be  
President of the Club!**

**“It’s no longer that we can run this multi-million dollar operation without a business plan, goals and objectives, and by committees who aren’t held accountable! Who of you runs your business this way?”**

Don Larson, President  
Medinah Country Club

# Responding to Member Feedback

Board and Committee Members are ‘conditioned’ to respond to Member feedback:

- How can you deal with it more effectively?
- “Have you shared this with Management?”
- Listen
- “Reduce It”
- “Write it down for me”
- Respond in writing



**As a Board Member,  
You don't own every problem!**

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# PRAXIS

**PRAXIS =  
“An alignment of  
behaviors with beliefs”**

Bob Proctor,  
Author/Consultant/Trainer

# Praxis in the Club World

- “We need to take the Club to the Next Level! But, we’ re not raising dues this year.”
- “We want a true CE/COO to run this club like a business! Just make sure not to do anything with Bobby, my favorite bartender!”
- “We’ve got to have the best conditioned course in the area. By the way, you NEED to skip that third aerification because I’m playing with guests this weekend.”
- “Of course, we’re a family club! Just don’t sit those kids in this room near us, ok?”

# The Annual Board Retreat

This is beyond the Orientation Process...  
this is to Organize, Strategize, and Prioritize!!  
(some even do it semi-annually!)

# Finally, most of the highest performing Clubs we've seen do not allow...

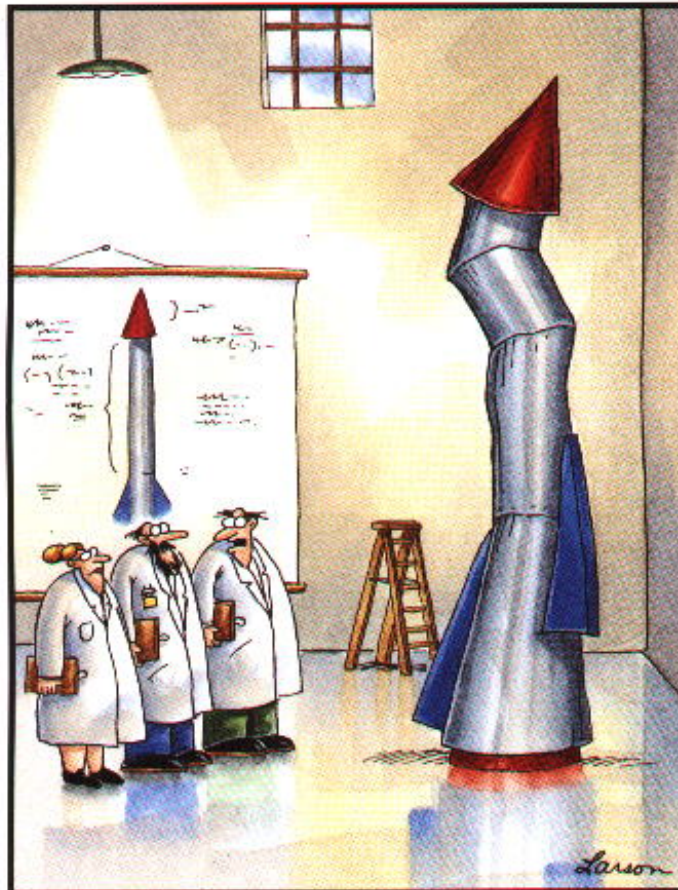
“Not on MY WATCH” mentality to prevail.

(Most times, it's simply pushing a difficult issue to someone else's watch!)

**“It may be common sense, but  
its not common practice.”**

Bob Biggerstaff, Immediate Past President  
Grandfather Golf & Country Club

In the end, it's certainly not brain surgery or



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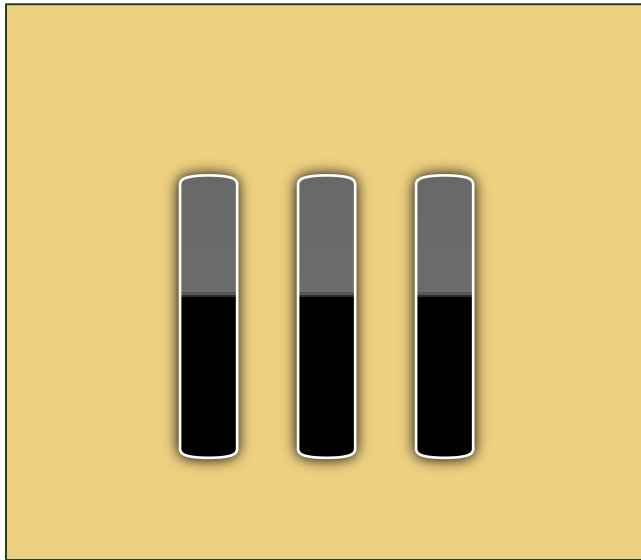
# Model Clubs use “Best Practices” to STAY Model Clubs

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# Strategic Planning

The Strategic Planning Committee is ***one of the two most important Committees in the Organization!***

**Very common to the highest performing, “best in class” in our view clubs is.....**

***A high level of Strategic Thinking, and An ACTIVE Strategic Plan!!***

# Begin with the End in Mind

- Strategic Planning establishes primary goals and objectives.
- The Annual Business Plan provides the tactical details aimed to achieve the strategic goals and objectives.

# Strategic Planning

- The Board needs to carefully consider the constitution of the Strategic Planning Committee and provide a means of continuity without cronyism! ***IN OUR PERFECT WORLD, THE BOARD IS THE STRATEGIC PLANNING COMMITTEE!***
- Go back to the Mission Statement -- and to the Action Plan -- MODEL ORGANIZATIONS use their Committees effectively and wisely to consider issues and make recommendations to the Board.

# Strategic Planning Things to Consider

- It's a road map for the future (beyond just tomorrow!) in an environment where often-times the 'players' change (Board and Committee members, etc.)
- It's NOT just a capital plan to determine facility needs, *but the strategic plan helps to determine and support capital decisions that MAY be needed, amongst many other things that will help to keep the community and club vibrant and perpetuating*

# Strategic Planning

- It determines who and what you are and what purpose you serve, or serves to reiterate same in an environment (club industry recession) where many clubs have to do ‘extreme makeovers’ just to stay alive! In effect, it establishes or re-establishes your ‘Brand’ so that all constituencies, internal and external, are clearly aware of who and what you are and provide
- It is the basis for your “Marketing Plan”

# Strategic Planning

- It helps to *prepare for* and *manage* change (and yet deter “change” for the sake of “change” each year by new Boards), which has become an increasingly more ‘normal’ part of the club world
- It’s about being PROACTIVE rather than REACTIVE, especially in this economic environment and while the club is still outperforming others in the local market
- It provides the management team with clear and measurable goals and objectives
- It’s *strategic* in nature, but sets the tone and annual direction for operational decisions and efforts

# Strategic Planning

- Helps your community and club understand and clarify its objectives and set goals accordingly (attainment of common goals) in a GROUP setting to build consensus
- Defines short-term actions and avoids deviating from “The Bronze Plaque on the Wall” (forces decisions/actions)
- Gets resident, member and employee buy-in early in the process to facilitate positive (politically supportive) change



# Strategic Planning

- Lends a greater degree of confidence of long-term success and improves long-range performance (helps the club remain economically viable while at the same time attempting to become recession proof)
- Creates a healthy disciplined methodology for decision making (laser-like)
- It is one of the common denominators found in today's top performing clubs

# Strategic Planning

**“The purpose of a plan is not to produce a plan, but to produce results.”**

# Strategic Planning Issues....

- Not simply 'Bricks and Mortar!'
- Governance, succession planning, etc.
- Bylaws
- Membership categories
- Changing/emerging demographics
- Brand/Mission
- 'Blue Sky' considerations (SOAR)
- Analyzing the SWOT

# Strategic Planning, a process that answers the following questions:

- **What do we want our club to be?**
  - What is our Brand?
  - What do we want our community and club to be?
  - What do our residents and members look like...now and in the future?
- **Where should we be five to ten years from now?**
  - What should our facilities and assets look like in order to accomplish our goals?
  - What will our demographics look like in 5 years? Ten years?
- **What needs to be done to satisfy our membership now and in the future?**
  - What changes or improvements do we need to make in order for all of this to happen? In our physical plant? With our Bylaws? With our governance and organizational structuring?

# The “Magic” of the Mission Statement and Supporting Goals

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# One Club's Effective Use of Mission, Vision and Core Values – Old Version

## MISSION STATEMENT:

Ballantyne Country Club is dedicated to the consistent delivery of *high quality personal service* and *excellent value*, in a *warm atmosphere of camaraderie*, for the enjoyment of its Members, their families and guests.

## VALUE STATEMENT:

Charlotte's premier family oriented private club we value excellence, integrity, teamwork, personal relationships and environmental and social responsibility.

## CORE VALUES:

Values that are truly important direct the decisions we make, define our character and preserve what is special about Ballantyne Country Club. They are:

### Service:

We go to extraordinary lengths to satisfy and delight our customers. We are passionate about the service we provide and the opportunity we are given to do so.

### Excellence:

We strive to be the very best we can be in everything we do.

### Integrity:

We engender trust and respect; acting ethically and encouraging honest and open communication.

### Diversity:

We ensure an interesting and inclusive environment and treating people, as we would like to be treated.

### Social Responsibility:

We are active members of the greater Ballantyne and Charlotte area communities. We pay forward both financially and through the works of our members.

### Shared Purpose:

Our success is dependent upon the collective energy and work of all our members and staff.

### Environmental Responsibility:

We respect our environment and recycle, reuse and reduce waste wherever and whenever we can.



# One Club's Effective Use of Mission, Vision and Core Values – New Version

## MISSION STATEMENT:

Ballantyne Country Club is dedicated to being Charlotte's premier **family-focused** club through the consistent delivery of the **highest quality personal service** and **excellent value**, in a **warm atmosphere of camaraderie**, for the enjoyment of its members and guests.

## VISION STATEMENT:

*To be the Carolinas' premier family-focused private club*

## CORE VALUES:

Values that are truly important direct the decisions we make, define our character and preserve what is special about Ballantyne Country Club. They are:

### Family-focused:

We maintain the family as the focus of programming and strategic investment.

### Fiscal Responsibility:

We meet the needs of the membership by providing a good value in a fiscally responsible manner.

### Service:

We go to extraordinary lengths to satisfy and delight our members and guests. We are passionate about the service we provide members and guests and the opportunity we are given to do so.

### Excellence:

We strive to be the very best we can be in everything we do.

### Integrity:

We engender trust and respect, acting ethically and encouraging honest and open communication.

### Social Responsibility:

We are active members of the greater Ballantyne and Charlotte area communities. We give generously both financially and through the works of our members.

### Inclusive:

We ensure a welcoming and inclusive environment, treating people as we would like to be treated ourselves.

### Shared Purpose:

Our success is dependent upon the collective and positive energy of our members and staff working to achieve our mission and vision.

### Environmental Responsibility:

We respect our environment and consider the impact on it in all of our decisions.



# Augusta National Mission Statement

The mission of Augusta National Golf Club is to provide an uncomplicated, private environment where its members can enjoy the finest of golf clubs. It is also to make a continuing contribution to the game of golf primarily by producing a world renowned golf tournament with a commitment toward innovation and preserving the traditions of the game.

Augusta National Golf Club is committed to principles of integrity, honesty, respect, and loyalty, is dedicated to continuous improvement, and the development of its employees and resources.





# ONE FORD

ONE TEAM • ONE PLAN • ONE GOAL

## ONE TEAM

People working together as a lean, global enterprise for automotive leadership, as measured by:

*Customer, Employee, Dealer, Investor, Supplier, Union/Council, and Community Satisfaction*

## ONE PLAN

- Aggressively restructure to operate profitably at the current demand and changing model mix
- Accelerate development of new products our customers want and value
- Finance our plan and improve our balance sheet
- Work together effectively as one team

## ONE GOAL

An exciting viable Ford delivering profitable growth for all

### Expected Behaviors

#### Foster Functional and Technical Excellence

- Know and have a passion for our business and our customers
- Demonstrate and build functional and technical excellence
- Ensure process discipline
- Have a continuous improvement philosophy and practice

#### Own Working Together

- Believe in skilled and motivated people working together
- Include everyone; respect, listen to, help and appreciate others
- Build strong relationships; be a team player; develop ourselves and others
- Communicate clearly, concisely and candidly

#### Role Model Ford Values

- Show initiative, courage, integrity and good corporate citizenship
- Improve quality, safety and sustainability
- Have a can do, find a way attitude and emotional resilience
- Enjoy the journey and each other; have fun - never at others' expense

#### Deliver Results

- Deal positively with our business realities; develop compelling and comprehensive plans, while keeping an enterprise view
- Set high expectations and inspire others
- Make sound decisions using facts and data
- Hold ourselves and others responsible and accountable for delivering results and satisfying our customers



# Relentless Pursuit of Alignment





Again.....

## **Your Mission Statement needs to be part of everything you do as a Club...**

- On the front page of your Board and Committee Books
- On your website for all to see!
- On the tag line of your Newsletter
- At the front door of your Clubhouse
- On the employee business cards
- On your member statements
- And, be the measure against which all your decisions are made!

**And Members should be regularly updated on the Strategic Plan....its status, the outlook, etc.**

***Model Clubs make Strategic Planning a Priority and normal order of business!***

**It has its place on EVERY Board Meeting agenda!**

**Club Boards and Committees must keep  
in mind the overall  
*“Mission Statement/Vision Statement/  
Core Values”*  
of the Club when carrying out their  
respective responsibilities.**

# Sample Strategic Planning Process

## Step one:

- Canvass the club to better understand the external and internal factors that determine the satisfaction and also the desires of the membership. Review financial and governance data, membership surveys and any other information that would assist in better understanding the current state of the Club.

## Step two:

- Review and analyze all data, building on the previous strategic planning efforts.

# Strategic Planning Process

## Step three: \_

- Conduct a strategic retreat with the Board and Management to review the current by-laws and governance structure and to gather input for the strategic plan. These meetings will use the SWOT method (Strengths, Weaknesses, Opportunities and Threats) to develop feedback for the plan. The desired result of this meeting will be to identify the “Core Values,” “Mission & Vision Statements” and to identify the key strategic issues facing the Community and Club.
- To expedite this process, the topics to be discussed participants should be sent to them in advance.

# Strategic Planning Process

## Step four:

- Build consensus and “buy in” to the plan by conducting focus group sessions with several staff, resident and committee groups, reviewing the results of the strategic issues identified by the Board and also identifying others suggested by the group.

## Step five :

- Develop a “draft copy” of the plan for feedback, modification and financial overlay.



# Strategic Planning Process

## Step six:

- In a second strategic session, ‘flesh out’ with the Board and executive team the top business and strategic issues, developing and “Action Plan” addressing accountabilities, related strategies, target dates, etc.

## Step seven:

- Finalize the plan that will allow the Club, your board and staff to successfully move forward, creating a “living document and process that will allow for constant monitoring and review.

# Strategic Planning

**“The purpose of a plan is not to produce a plan, but to produce results.”**

# Action Plan

Issue	Goal/ Objective	Strategy/ Tactics	Assigned to	Due Date
Membership	Net increase of 100 in total membership with an emphasis on golf & sports	<ul style="list-style-type: none"> <li>• <b><i>New member growth</i></b></li> <li>• Construction pricing</li> <li>• Neighborhood and corporate outreach</li> <li>• Realtor Open house</li> <li>• Explore new categories of membership</li> <li>• Existing member retention</li> <li>• Ambassador Programs</li> <li>• New member mixers</li> <li>• Ensure high member satisfaction</li> <li>• New member surveys</li> </ul>	Membership Director and Membership Committee	Ongoing through 2019
		Membership Upgrades Develop and market programs to entice existing members to upgrade their membership		

# Action Plan

Issue	Goal/ Objective	Strategy/ Tactics	Assigned to	Due Date
Facilities	Enhance and Maintain facilities to maintain high membership satisfaction along with attracting new members	<ul style="list-style-type: none"> <li>• Implement five-year facilities maintenance improvement plan</li> <li>• Develop a plan to Expand and Upgrade tennis</li> <li>• Develop a plan to Upgrade aquatics center</li> <li>• Evaluate potential use for Highgrove</li> <li>• Evaluate expanded casual dining options</li> <li>• Begin the Development a long range facilities improvement plan</li> </ul>	<ul style="list-style-type: none"> <li>• Facilities and Finance Committee and General Manager</li> </ul>	<ul style="list-style-type: none"> <li>• October 2016</li> <li>• July 2015</li> <li>• October 2016</li> <li>• July 2015</li> <li>• October 2015</li> <li>• January 2017</li> </ul>
Governance	Improve governing procedures and update all related by-laws, policies and procedures.	<ul style="list-style-type: none"> <li>• Review and update existing by-laws</li> <li>• Develop a leadership succession plan</li> </ul>	By-law Committee and Board and GM	November 2015

# Action Plan

Issue	Goal/ Objective	Strategy/ Tactics	Assigned to	Due Date
Financial	<ul style="list-style-type: none"> <li>• Maintain financial stability and a positive cash-flow</li> <li>• Develop a plan to accumulate funds for to fund depreciation for future maintenance</li> <li>• Develop a plan to accumulate funds for future improvements</li> </ul>	<ul style="list-style-type: none"> <li>• Develop an annual and five-year operational and capital plan</li> <li>• Establish a capital reserve fund</li> </ul>	Finance Committee and Controller	<ul style="list-style-type: none"> <li>• Ongoing</li> </ul>

# Action Plan

Issue	Goal/ Objective	Strategy/ Tactics	Assigned to	Due Date
Marketing and Communications	Inform, engage and excite current and prospective members	Develop multi-year communication plan to support: --New member growth --Retention --Engagement (more utilization) --Connectivity --Governance & transparency - BCC Branding	Communication committee, Marketing and Membership director, Communications Manager & GM	Current through October 2015
Member Services Engagement, utilization and programming	Improve overall membership satisfaction and utilization	<ul style="list-style-type: none"> <li>• Innovative and non-traditional programming including those with a family focus</li> <li>• Anticipating members future needs and desires</li> <li>• Continuous surveys and measurement</li> <li>• Review best practices and benchmarking</li> </ul>	Social, Golf Tennis, House and FAC Committees and Management	Ongoing

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# Summarized observations



# Q & A

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**Thanks so much for  
attending!**

**Board & Executive Clubs:  
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Florida Chapter CMAA  
November 2015

Presented by  
**Richard M. Kopplin**  
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**John "Jack" Sullivan, CCM**

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