



# Governance & Leadership Symposium

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

August 25–26, 2024 | Bel-Air Bay Club | Pacific Palisades, CA



Founded in 1927, the **Club Management Association of America (CMAA)** is the largest professional association for managers of membership clubs with more than 7,800 members throughout the US and internationally. Our members contribute to the success of 3,000 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 **KOPLIN 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.



**CLUB  
MANAGEMENT  
ASSOCIATION  
OF AMERICA**



**For further information, visit [cmaa.org/summits](https://cmaa.org/summits)**



## Governance & Leadership Symposium

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

### **Sunday Reception: Lower Clubhouse – Tours of Lower Clubhouse**

16800 Pacific Coast Highway, Pacific Palisades, CA 90272

6:00–8:00 p.m. Hosted by Club Leadership Alliance

### **Monday Agenda: Upper Clubhouse**

16801 Pacific Coast Highway, Pacific Palisades, CA 90272

7:00–8:00 a.m. Registration and Breakfast

- 8:00–8:15 a.m. **GM/COO and President of Club to Welcome and Provide Club History**
- 8:15–8:30 a.m. **Program Overview, Learning Objectives and Introductions**  
*Tom Wallace, CCM, CCE, KOPPLIN KUEBLER & WALLACE*
- 8:30–9:30 a.m. **Session One: Governance/Leadership Best Practices Informed Leadership**  
*Kurt Kuebler, CCM; Dr. Jim Butler; John Schultz, CCM, CCE*
- 9:30–10:30 a.m. **Session Two: Governance/Leadership Best Practices Strategic Stewardship**  
*Kurt Kuebler, CCM; Dr. Jim Butler; John Schultz, CCM, CCE*
- 10:30–10:45 a.m. **Networking Break**
- 10:30–11:30 a.m. **Session Three: Governance/Leadership Best Practices Empowered Management and Staff**  
*Kurt Kuebler, CCM; Dr. Jim Butler; John Schultz, CCM, CCE*
- 11:30 a.m.–12:30 p.m. **Session Four: Governance/Leadership Best Practices Compelling Member Experience**  
*Kurt Kuebler, CCM; Dr. Jim Butler; John Schultz, CCM, CCE*
- 12:30–1:00 p.m. **(Lunch) Session Five: Club Legislation – The Political Climate and the Impact on Clubs**  
*Joe Trauger, President and CEO, National Club Association*
- 1:00–2:30 p.m. **Session Six: The Power of the Presidents Council Dual 30-Minute Breakout Group Discussion Compare & Contrast Findings**
- 2:30–3:00 p.m. **Networking Break – Club Tours**
- 3:00–4:00 p.m. **Session Seven: Club Trends – Change and Adaptation Post-COVID Club Trends**  
*Jeff Morgan, FASAE, CAE, CMAA*
- 4:00–4:30 p.m. **Moving Forward: Wrap up and Key Takeaways**  
*Tom Wallace, CCM, CCE, KOPPLIN KUEBLER & WALLACE*

**Lodging:** CMAA does NOT have a local room block but does have a few hotels and clubs that it will recommend for lodging.

**Luggage Storage:** Luggage can be stored on Monday at the Upper Clubhouse if needed.

**Dress code:** Business Casual – No jacket or ties required on Sunday or Monday. No denim or open-toed shoes, please!