

A stylized tree with a brown trunk and branches, set against a white background. The tree is composed of various shades of green circles of different sizes, representing leaves. Several of these circles contain a white upward-pointing arrow, symbolizing growth and progress. The tree is positioned on the left side of the page, with its branches extending towards the right.

# 2016 Annual Report



**CLUB  
MANAGERS  
ASSOCIATION  
OF AMERICA**



## CMAA Mission Statement

*The Club Managers Association of America advances the profession of club management by fulfilling the educational and related needs of its members.*

## Vision Statement

*A thriving club industry led by CMAA educated professionals.*



## **President Jill Philmon, CCM, CCE**

**CMAA is working** to remain relevant to its members as well as to actively promote this industry to the next generation.



In the first year of implementing our 2016-2020 Strategic Plan, CMAA has made great strides in providing many opportunities for all CMAA members, especially in the area of education where CMAA and The Club Foundation are working closely to support the initiatives that will surely make our Association stronger and our members more equipped for the challenges the future holds.

This year, CMAA and The Club Foundation collaborated with The Generational Center for Kinetics to undertake generational research on interest in club membership. This revealing research will arm club management professionals with valuable insights into what each generation of potential club members is seeking, with further practical guidance to be released into 2017. I have already put several of these ideas into practice at my club, and we are reaping the benefits of this industry research.

In our efforts to ensure relevancy, CMAA has worked to improve educational offerings at every level. For the first time, the CMAA National team planned and executed the annual Mid-Management Conference in Washington, DC, in September. There have been lots of changes to this conference over the last 16 years, which have been for the greater good of our mid-management professionals, our next great leaders of this Association.

Governance has been identified by CMAA members as one of your top ten challenges. For senior managers, 2016 marked the first Governance/Leadership Summits which expanded cooperative club management and board education at regional locations. More than 200 attendees participated in one-day summits in California, Illinois, New Jersey and Texas. Education focused on best practices in club governance and change management, which clubs across the country are facing with a multi-generational membership and workforce.

When you look at the power of our CMAA network from a 30,000 foot perspective, it is incredible. Networking with professionals who you respect and trust can help you with ideas or even validate the ones you have. It's hard to explain all we do in this industry so having a network that you can vent to, ask advice from or just laugh about a situation with is priceless. CMAA members will freely tell you anything you need to know and suggest ideas that have worked for them. Our network is our biggest asset, and one that has been well tended throughout 2016.

## **CEO Jeff Morgan, FASAE, CAE**

**2016 was a year of movement** for CMAA, and the momentum will continue in 2017.



CMAA began 2016 with the approval of a strategic plan, providing a guiding document that focuses on CMAA's evolution over the next five years. The plan's target areas are professional development, membership and marketing, research, advocacy, club management and organization management. The CMAA Board of Directors approved the plan at its February 2016 meeting, setting the stage for a busy and fulfilling year.

The Club Foundation (CF) has new energy behind it that will propel it forward, and allow the organization to better serve its mission to support the advancement of club management professionals, funding industry education programs through scholarships and grants.

CMAA and CF approved a new governance structure and a financial reorganization that has aligned the two organizations and leverages each other's strengths for the success of CMAA members and clubs. In September, CF hired a new Foundation Director, Carrie Wosicki, to lead the Foundation forward with a focus on donor engagement and the fulfillment of CF's mission.

CMAA is also turning into a thought leader focused on research to aid you as your partner in club management. CMAA and CF recently completed a generational study regarding the impact on potential club members. Results showed positive paths forward for the evolution of clubs to best serve your incoming members from Generation X and Y. This is the kind of research which will spur conversations with your board and staff, and best prepare you to lead your own organization in today's chaotic climate.

To deliver richer data and research, CMAA announced a new direction with our annual club survey and club analytical reports starting in 2017. CMAA has contracted with a new provider to deliver enhanced research through the Financial and Operations and Compensation and Benefits reports, and to work at the sole direction of CMAA without commercial conflicts. CMAA members who participate in the survey will continue to receive a complimentary copy of the report, as well as the additional Club Performance Report which provides an easy

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means for clubs to compare their results to the overall findings. CMAA has gone through this process before and this is just the next step in upgrading our ability to provide the data you need in your boardroom.

This year, CMAA successfully launched a regional concept, the Governance/Leadership Summits, to support club managers to work more effectively with their club boards. CMAA's reason for existence is to help you solve problems and governance is one of your top five member challenges. Our focus is to arm you with the education and resources to tackle these challenges.

In the area of communications and member engagement, CMAA has undertaken steps to improve our flagship magazine, *Club Management*. Beginning in March, the magazine will be published six times a year by Cypress Magazines with improved and expanded editorial content to better meet your needs for best practices, news and information.

In 2017, CMAA will celebrate its 90th Anniversary. CMAA has taken the first steps to create a better national and chapter partnership to leverage our combined strengths to create a modern approach to serving our members. This is a journey many organizations like ours are taking as the world has changed from when CMAA was formed. The journey is one to serve the members in the best way possible as both national and chapters exist with the similar missions. We worked with Avenue M to collect data from chapters, members and other key constituents to present us with insight for evolution.

Internally, CMAA staff completed an in-depth culture analysis. Our cultural accelerants include our member focus and passion. While we have identified cultural staff inhibitors we need to work on, I could not think of a better anchor for our internal staff culture – our members!

Financially, CMAA is evolving into a healthy and financially well-managed organization, which helped to maintain the costs of Professional member dues for 2017.

As 2016 comes to a close, CMAA has made substantial progress in all areas, and will continue to focus forward on our members and their opportunities and challenges.

# Balance Sheet

## Club Managers Association Of America And Affiliates Consolidated Statement Of Financial Position

Year Ended October 31, 2016

| <b>ASSETS</b>                           | <b>2016</b>              |
|---|--------------------------|
| <b>Current Assets</b>                   |                          |
| Cash & Cash Equivalents                 | 4,783,193                |
| Accounts Receivable                     | 89,408                   |
| Pledges Receivable                      | 580,262                  |
| Prepaid Expenses                        | <u>288,206</u>           |
| Total Current Assets                    | <u>5,741,069</u>         |
| Pledge Receivable non current           | 198,360                  |
| Investments in Marketable Securities    | 2,288,997                |
| Property & Equipment                    | 1,930,591                |
| <b>Total Assets</b>                     | <b><u>10,159,017</u></b> |
| <b>LIABILITIES AND NET ASSETS</b>       |                          |
| Payable                                 | 87,017                   |
| Accrued Expenses                        | 705,308                  |
| Deferred Income                         | 4,861,804                |
| Long term debt, current portion         | <u>220,798</u>           |
| Total Current Liabilities               | <u>5,874,927</u>         |
| Long Term Debt                          | 2,942,690                |
| Other Liabilities                       | 36,826                   |
| Net Assets                              | 1,304,574                |
| <b>Total Liabilities and Net Assets</b> | <b><u>10,159,017</u></b> |

# Statement of Revenue and Expenses

## Club Managers Association of America and Affiliates Consolidated Statement Of Activities and Changes In Net Assets

Year Ended October 31, 2016

### REVENUES

|  |                         |
|--|-------------------------|
| Member Dues  | 3,416,022               |
| Meetings & Events                                  | 2,114,063               |
| Professional Development                           | 1,761,776               |
| Business Development                               | 1,443,880               |
| The Club Foundation Contributions and other income | 362,492                 |
| Interest Income                                    | 182,779                 |
| Other Income                                       | 299,190                 |
| Wine Society                                       | <u>113,151</u>          |
| <b>Total Revenues</b>                              | <b><u>9,693,353</u></b> |

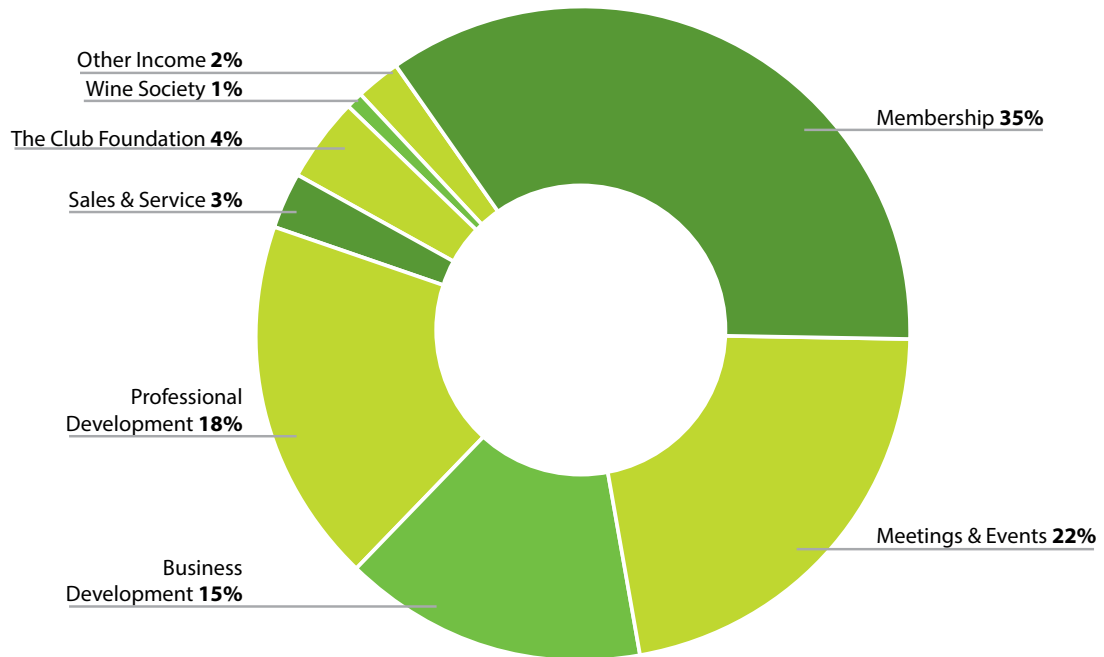
### EXPENSES

|                            |                         |
|----------------------------|-------------------------|
| Meetings & Events          | 2,288,559               |
| Professional Development   | 1,703,785               |
| General Admin & Board Comm | 1,627,209               |
| Business Development       | 1,214,344               |
| The Club Foundation        | 444,760                 |
| Member Services            | 783,144                 |
| Wine Society               | 201,543                 |
| Building                   | 528,112                 |
| Other Expenses             | <u>398,248</u>          |
| <b>Total Expenses</b>      | <b><u>9,189,704</u></b> |

|                                      |                         |
|--------------------------------------|-------------------------|
| Changes in Net Assets                | <u>503,649</u>          |
| Net Assets beginning of year         | (2,665,228)             |
| Consolidation of The Club Foundation | <u>3,466,153</u>        |
| <b>Net Assets end of year</b>        | <b><u>1,304,574</u></b> |

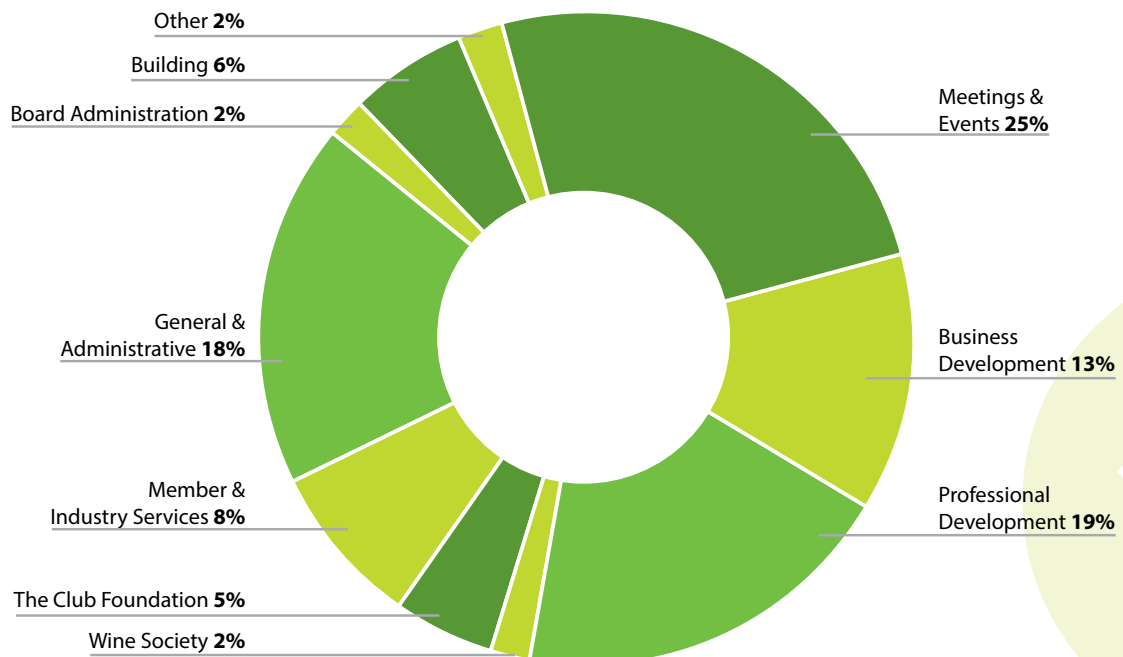
## CMAA Consolidated Operating Revenue by Source

Fiscal Year 2016



## CMAA Consolidated Operating Expense by Activity

Fiscal Year 2016

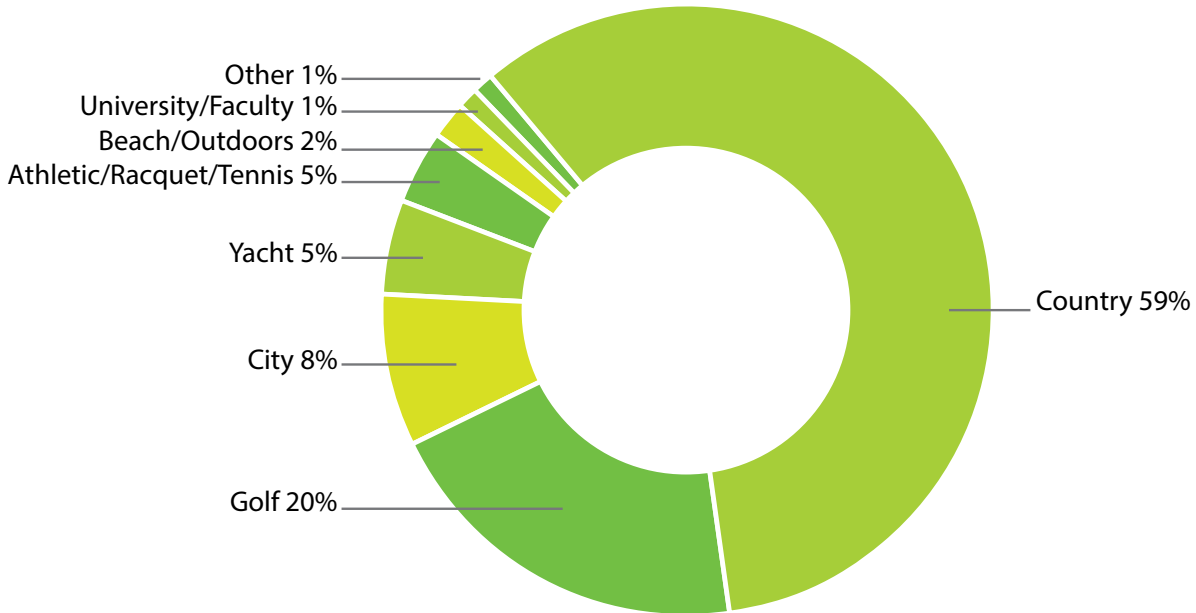




# At a Glance

## Members

Percentage of Members by Club Type:



6,640

Total Number of Members

683

New Members in 2016

## Advocacy



Relaunched CMAA's Advocacy Platform, *Clubindustryvotes.org*, in June.

975

Tracked **975** bills affecting the club industry at the federal and state levels.

58

Issued five Action Alerts through *Clubindustryvotes.org*, prompting member outreach to more than **58** Congressional offices.

## Professional Development

### Business Management Institutes:



574

Sixteen US-based programs were held, attended by **574** club management professionals.

20

BMIs have expanded internationally, with **20** programs presented outside of the US in 2016.

### Governance/Leadership Summits



NEW!

First introduced these summits, designed to educate club board members.

207

A total of **207** attendees participated in **four** programs held regionally across the country.

### CMAA University:



868

Accessed by **868** CMAA Members



Courses Passed: **4,619**



Total Number of Mentees in Manager in Development (MID) Program: **52** Mentees including International Partnership with South Africa. **85** Percent Increase Over 2015



Launched Micro Learning which currently features **22** talks for a total of 4.5 hours of content

227

Overall, CMAA University offers **78.5** complimentary credits (**4** AA, **74.5** CMI) and a total of **227** credits including purchasable content.

1,900

Nineteen Webinar Opportunities with more than **1,900** Association Credits Earned by CMAA Members.

FREE

Webinars remain free to all members and archived recordings are available free-of-charge on CMAA University.

### Certification:



New Certified Club Managers (CCM): 32  
**33** Percent Increase Over 2015



New Honor Society Inductees: 26  
**23** Percent Increase Over 2015



New Certified Chief Executives (CCE): 37  
**131** Percent Increase Over 2015



## 89th World Conference on Club Management and Club Business Expo

**4.45/5** Average Session Rating

**NEW!** 50.5 percent of the presenters were first-time presenters.

**SOLD OUT!** The 2016 Club Business Expo was sold out and exceeded expectations by more than **\$50,000**.

**163.2** Average Attendees Per Session

Eliminated the **7:00 a.m.** sessions in 2016

**101** Total Number of Sessions Presented

Modernized the attendance/evaluation card process by utilizing the Conference App

### Business Development

Renewals for the Club Resource Center (CRC) increased from 65 percent (PCS conversions) to 75 percent (First CRC renewals). **10** percent increase over 2015

**14** The Corporate Alliance Program maintained all **14** current partners plus Royal Cup Coffee.

**95** The Affiliate Program continued to generate more than \$100,000 with **95** participating companies.

### The Club Foundation

Unveiled a new logo  
**The Club Foundation**

The Club Foundation invested **\$72,500** to support research and causes including the Millennial Study Research, Caddy for a Cure, Tee It Up For The Troops and Next Gen Golf.

**30%** **30 percent** of CMAA's Professional members donated to CF in FY2016.

**26** Awarded **26** Scholarships and Grants through more than five established scholarship and grant programs, totaling **\$269,522**.

## Technology



CMAA debuted an event app in 2016 which became the default method for confirming attendance at national events.



For the first time in 2016, Chapter Presidents submitted their chapter annual reports online.



CMAA's most popular resource sold online in 2016 was the *Uniform System of Financial Reporting for Clubs, Seventh Edition*.



More than **1,600** online registrations were received for the World Conference in San Diego in 2016.



The RSVP process for most of CMAA's events was moved online in 2016.



Most users browse CMAA's website, using Google Chrome on desktop devices.

## Quote of the Year:

*"When you look at the power of our CMAA network from a 30,000 foot perspective, it is incredible. Networking with professionals who you respect and trust can help you with ideas or even validate the ones you have. It's hard to explain all we do in this industry so having a network that you can vent to, ask advice from or just laugh about a situation with is priceless. CMAA members will freely tell you anything you need to know and suggest ideas that have worked for them."*

*—President Jill Philmon, CCM, CCE*

# 2016 Board of Directors



## **PRESIDENT**

JILL R. PHILMON, CCM, CCE  
Ballantyne Country Club  
Charlotte, NC

## **VICE PRESIDENT**

ROBERT C. JAMES, CCM, CCE, CHE  
Westchester Country Club  
Rye, NY

## **SECRETARY-TREASURER**

ROBERT J. CRIFASI, CCM, CCE, CPA  
New Orleans Country Club  
New Orleans, LA

## **IMMEDIATE PAST PRESIDENT**

TONY D'ERRICO, CCM, CCE  
Quail West Foundation  
Naples, FL

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Myers Park Country Club  
Charlotte, NC

BRIAN KROH, CCM  
John's Island Club  
Vero Beach, FL

WILLIAM E. LANGLEY, CCM  
Quail Ridge Country Club  
Boynton Beach, FL

TODD D. MARSH, CCM, CCE  
Conway Farms Golf Club  
Lake Forest, IL

MITCHELL S. PLATT, MCM, CCE  
Cosmos Club  
Washington, DC

RANDALL J. RUDER, CCM, CCE  
Beach Point Club  
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MICHAEL D. SEABROOK, CCM, CCE  
Belle Meade Country Club  
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RICHARD D. SPURLIN, CCM, CCE  
Eugene Country Club  
Eugene, OR

CHRISTINA TOUPS, CCM, CCE  
Ridglea Country Club  
Fort Worth, TX

## **CHIEF EXECUTIVE OFFICER**

JEFF MORGAN, FASAE, CAE