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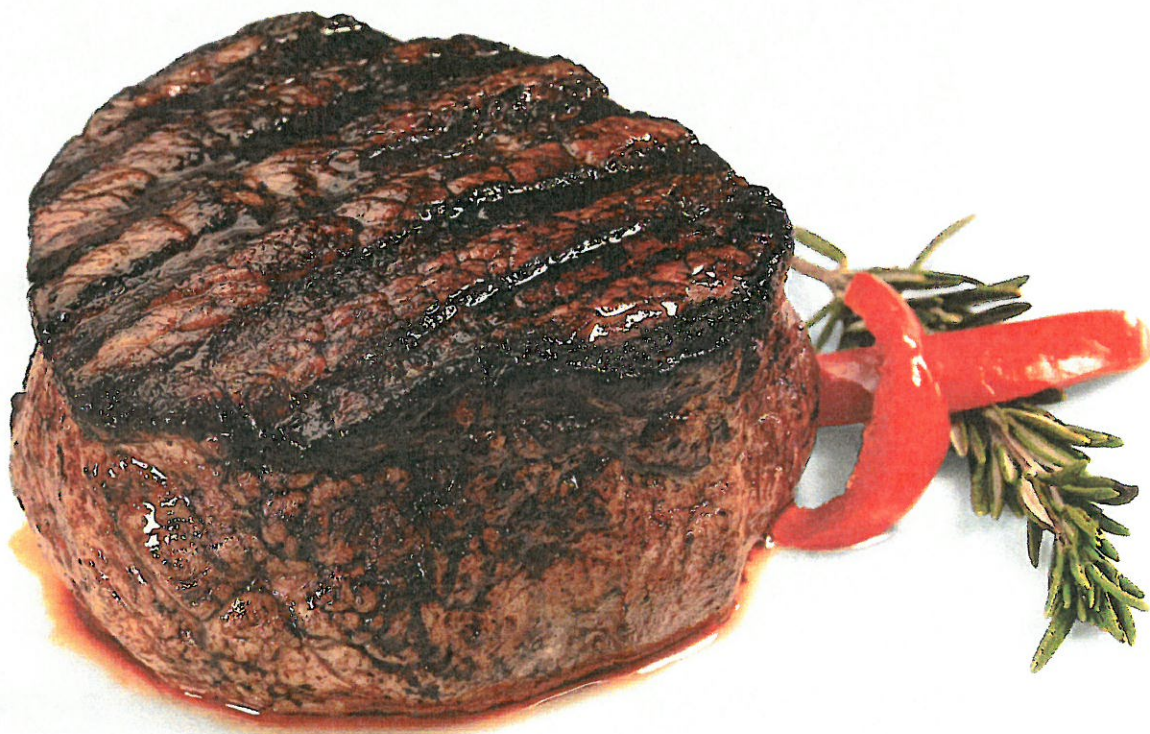
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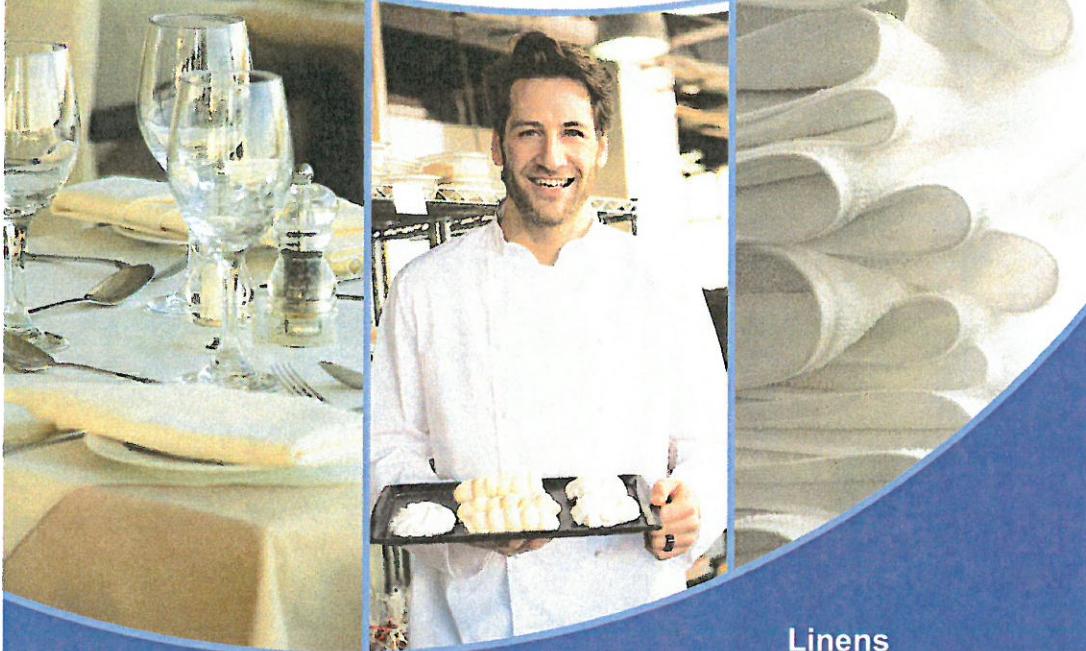
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# CONFERENCE HOST CLUB



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## Important Reminders

Overall this is a very busy weekend in the city. Please note there is a home Steeler game on Sunday at 1:00.

Valet parking is available at the Club with the exception of Sunday. The following garages are nearby: Smithfield-Liberty Garage (attached to the Club), Mellon Square Garage, K&L Gates Garage. If using the Smithfield-Liberty Garage, the entrance to the Club can be found on the 6<sup>th</sup> floor of the garage.

Cell phones shall remain in silent mode and may only be used for voice calls in designated areas throughout the Club.

Wi-Fi is available and no password is required.

The dress code for all education sessions and Club tours is jacket no tie for men and equally appropriate attire for ladies.

For those attendees who are staying at the Duquesne Club please note the following dress code to be adhered to in and around the Club: No jeans, t-shirts, shorts, tennis shoes, or the like may be worn in any dining room or bar at any time with the exception of the Health & Fitness Dining room. Casual attire may be worn when entering & exiting the club and at check-in & check-out time.



# Conference Schedule

## Saturday

6:00 pm—7:00 pm Meet and Greet—**Billiards Room**

## Sunday

10:30 am—11:30 am Registration at the Duquesne Club—**Reading Room, First Floor**

11:30 am—12:45 pm Chef's Edu-Station Lunch Reception—*Hosting events in non-traditional spaces*—**Main Kitchen, Third Floor**

1:00 pm—2:30 pm Gabe Aluisy—*Marketing to Millennials*—**Main Dining Room**

2:45 pm—3:45 pm Charles Carrol—*Essence of Greatness*—**Main Dining Room**

4:00 pm—5:30 pm Jeff Downs—*Execution Excellence*—**Main Dining Room**

6:00 pm—11:15 pm Depart Duquesne Club for Club Tours

**Appetizers at Pittsburgh Golf Club**

**Dinner at Longue Vue Club**

**Desserts at Oakmont Country Club**

## Monday

8:00 am—9:00 am Breakfast—**Red Room, Second Floor**

9:15 am—12:00 pm Norm Spitzig—CMI Workshop—*Proven Strategies for Wildly Successful Club Operations*—**Main Dining Room**

12:15 pm—1:15 pm Lunch—**Walnut Room, Fourth Floor**

1:30 pm—5:30 pm Norm Spitzig—CMI Workshop—*Proven Strategies for Wildly Successful Club Operations*—**Main Dining Room**

6:00 pm—10:00 pm Depart to St. Clair CC: Eric Asimov—Educational Wine Dinner

## Tuesday

7:30 am—8:30 am Breakfast—**Red Room, Second Floor**

8:00 am—9:00 am Curtze Food Educational Service - Tim Jackson, Joe DiGaetano, Randy Work—*Marketing to the Industry Trends and Beyond*  
**Main Dining Room**

9:15 am—10:30 am Brad Steele—*Government Matters '17*—**Main Dining Room**

10:30 am—10:45 am Closing Remarks

11:00 am Depart for Allegheny Country Club

11:30 am—1:00 pm Golf Outing Lunch and Warm-up

1:00 pm—5:00 pm Golf

5:00 pm—6:00 pm Golf Reception



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# About

**Gabriel Aluisy is the founder of The Private Club Agency, a Tampa, Florida based design, marketing and consulting firm focused on membership marketing and retention strategy at private clubs. He is the author of *The Definitive Guide to Membership Marketing* and the best-selling book *Moving Targets: Creating Engaging Brands in an On-Demand World*. Each week, Gabriel hosts the Private Club Radio Show, the industry's first and only podcast dedicated to private club education.**

**Gabriel has been featured in Entrepreneur®, NBC, iHeart Radio, and many other leading publications. His keynotes have included the Professional Club Marketing Association's National Conference, The Florida Club Summit, the Asia Pacific Golf Summit as well as many regional events. He is a graduate of American University's School of Communication.**







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**GABRIEL ALUISY**

# **MARKETING TO MILLENNIALS**

- Distinguish the driving motivations of Millennials – what really makes them tick.
- Discover how to best communicate and market your club to this generation
- Devise ways your club can build habit-forming behaviors for this age group
- Turn their biggest motivators, like the Fear of Missing Out, into your biggest asset
- Prepare your club's marketing and programming to attract new Millennial members



# MARKETING TO MILLENNIALS



GABRIEL ALUISY

## EXPERIENCES

What unique experiences does / can your club offer?

*GOLF*

---

*FITNESS & SPA*

---

*TENNIS & ATHLETICS*

---

*DINING*

---

*EVENTS*

---

*SAILING or OTHER*

---

How can you encourage engagement?

---

---

How can you reward engagement?

---

---

## F.O.M.O.

What is one can't miss event / opportunity that your club offers?

*GOLF*

---

*FITNESS & SPA*

---

*TENNIS & ATHLETICS*

---

*DINING*

---

*EVENTS*

---

*SAILING or OTHER*

---

# MARKETING TO MILLENNIALS



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## VALUES

What are your club's core values?

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---

---

What environmentally friendly habits does your club participate in?  
(i.e. - recycling program, natural pesticides, herb garden)

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---

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---

---

What charities / causes does your club support or align with?

---

---

---

---

---



# MARKETING TO MILLENNIALS



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## PERSONALIZATION

What can you do to personalize your approach with members?

---

---

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---

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What can you do to personalize your approach with prospects?

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---

---

---

## QUICK, ATTENTION-GETTING COMMUNICATION

What 7 words (or less) perfectly describe your club / department?

---

---

# MARKETING TO MILLENNIALS



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## EMOTIONAL FULFILLMENT

What are 3 emotional benefits your club / department provides?  
(i.e. - safety & security, a sense of belonging, camaraderie, tranquility)

- 1 \_\_\_\_\_
- 2 \_\_\_\_\_
- 3 \_\_\_\_\_

## HABITS

How can you gamify these experience

*PROSPECT*

---

*NEW MEMBER*

---

*TENURED MEMBER*

---

What can you gamify in these departments?

*GOLF*

---

*FITNESS & SPA*

---

*TENNIS & ATHLETICS*

---

*DINING*

---

*EVENTS*

---

*SAILING or OTHER*

---



# MARKETING TO MILLENNIALS



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## 30 DAY HABIT PLAN

Psychologists say it takes 30 days to form a habit. Millennials don't make rash decisions. For these reasons, I recommend making a 30 day plan to make your club offering a habit. **IMPORTANT:** This can and should be used for both prospects and existing members alike.

Your Overall Goal: *i.e. - Become a member* \_\_\_\_\_

Week 1 Goal / Desired Action: *i.e. - Create a desire* \_\_\_\_\_

Week 1 Activities Week 1 \_\_\_\_\_

Follow-up \_\_\_\_\_

Week 2 Goal / Desired Action: *i.e. - Feel a sense of belonging* \_\_\_\_\_

Week 2 Activities Week 2 \_\_\_\_\_

Follow-up \_\_\_\_\_

Week 3 Goal / Desired Action: *i.e. - Create a memorable experience.* \_\_\_\_\_

Week 3 Activities Week 3 \_\_\_\_\_

Follow-up \_\_\_\_\_

Week 4 Goal / Desired Action: *i.e. - Create a sense of relaxation* \_\_\_\_\_

Week 4 Activities Week 4 \_\_\_\_\_

Follow-up \_\_\_\_\_

# MARKETING TO MILLENNIALS



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## ACTION PLAN

1

### Review your marketing collateral and ads.

- Focuses on experiences
- Club values are front and center
- It uses personal language
- There is a strong call to action / urgency
- Copy appeals to emotions not logic
- Copy is short and sweet

2

### Create engagement opportunities throughout your club.

- Evaluate potential areas of engagement
- Create engagement opportunities and ask members and guests to interact
- Draft a plan to recognize and reward behavior

3

### Build a 30 day habit plan.

- Decide an overall goal
- Create weekly goals, activities & follow up
- Review results











# MARKETING MEMBERSHIP **TO MILLENNIALS**



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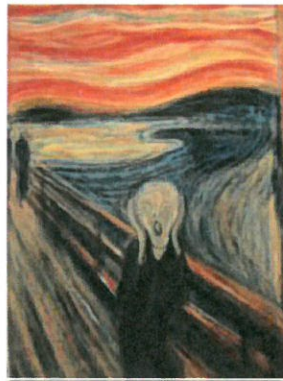
WE'LL TALK ABOUT MILLENNIALS  
BUT IT'S REALLY A CULTURAL SHIFT

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IF YOU FEEL  
A LITTLE  
LIKE THIS

It's ok, you're not alone.



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AND SINCE  
THIS IS ABOUT  
MILLENNIALS

This is probably more fitting.



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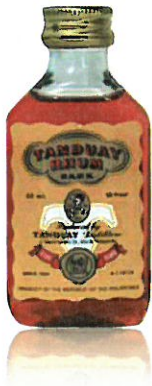
DO YOU HAVE  
WHAT IT TAKES?

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YES, **YOU DO!**

You just need to find it, and make it a focus.



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## YES, **YOU DO!**

You just need to find it, and make it a focus.

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## A FEW **FACTS:**

- The largest generation - 75.4 million
- Currently ages 21-37 (2 distinct groups 20s/30s)
- In less than 10 years, they will comprise 75% of the nation's workforce
- Currently, their purchasing power is \$2.45 Trillion

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## **CLUBS OFTEN SAY:**

WE DON'T MARKET  
OURSELVES

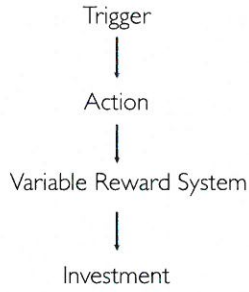
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**Let's mimic how millennial's tech forms habits.**



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## SAMPLE 30 DAY **PLAN**

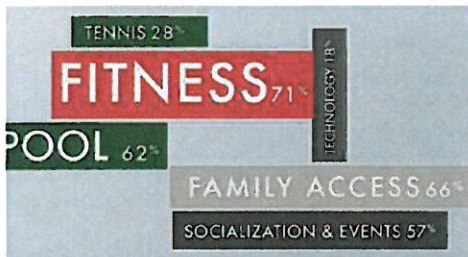
- Tour Club
- Invite to have dinner
- Invite for round of golf or tennis game
- Free lesson with pro
- Invite to affinity group
- Weekly email update
- Add *them* on social media

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## **Facilities & Programming**

Non-Golf Amenities Important to Millennials



Source: Global Golf Advisors / NextGenGolf Millennial Golfer Survey

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**Engagement**



LIVE STREAMING IS A  
BRAVE NEW WORLD

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**Process**

**HABITS TAKE 30 DAYS**

So why not consider it a 30 day sales cycle?

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"AS A MEMBERSHIP DIRECTOR, YOUR GOAL  
IS NOT ALWAYS TO GET THE CHECK, IT'S TO  
MOVE THE SALE FORWARD!"

**-Susan Greene, PCMA President**

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amazon alexa

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amazon alexa

Reviews powered by



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CLUBS THAT THRIVE ARE  
**PROACTIVE, NOT REACTIVE**

Engagement, Process, Facilities & Programming,  
& Governance

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#8

## SAVVIER THAN EVER

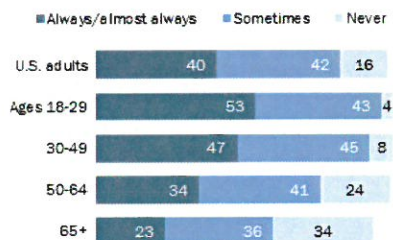
It's critical to monitor your online reputation.



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Over 50% of adults under 50  
*routinely* check online reviews before buying



Source: Pew Research Center

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## THE BIG 3



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#7

## GAMIFY THE EXPERIENCE



## WHAT CAN YOU **GAMIFY**?

- The referral process
- Your practice facility
- Your wine / craft beer list
- Spa & Fitness Use
- Event attendance

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## EXERCISE & **STRETCH**



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## INSTEAD OF THIS

The best kept secret  
in Pittsburgh.

## SAY THIS

Come explore.  
We've been waiting for you.

ALUISY.COM

813.344.4769

## INSTEAD OF THIS

We offer a championship 18  
hole Fazio designed course,  
12 har-tru tennis courts, a  
modern fitness facility, and a  
250 seat formal dining room.

## SAY THIS

Imagine the possibilities.

ALUISY.COM

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## EXERCISE & STRETCH



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# MOTHER'S DAY *Brunch*

**Celebrate and pamper your Mother...  
the way she deserves.**

Please join us for an unforgettable Brunch crafted by our brilliant culinary team especially for your Mother's special day.



**ALUSY.COM**

**813.344.4769**

## EXERCISE & STRETCH



**ALUSY.COM**

**813.344.4769**

## #5 SHORT & SWEET.

You have 8 seconds & your competing with 5,000 other ad messages per day.



Don't overcomplicate the message.

**ALUSY.COM**

**813.344.4769**



## PERSONALIZATION **QUICK TIPS:**

- In ads, use words like you / your / yourself.
- When appropriate, use their name in mailers, eblasts and marketing packets.
- When giving a tour, have key staff notified with name and important info like home town.

ALUISY.COM

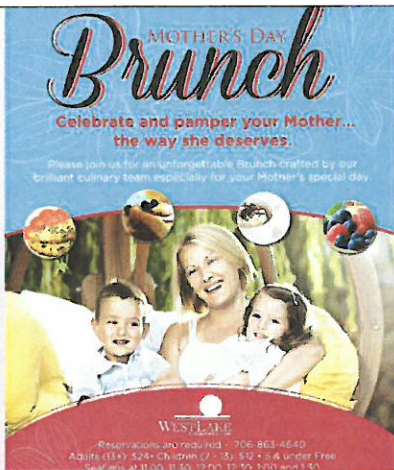
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Guests hear their name no less than 3 times

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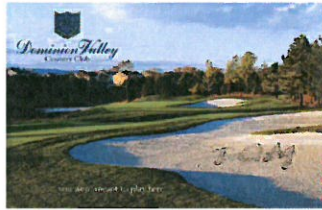
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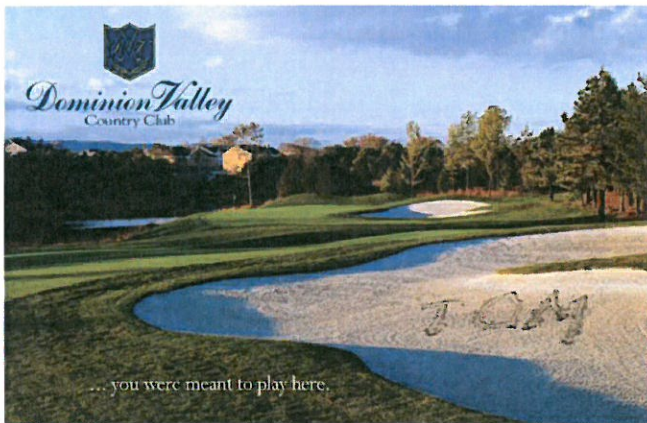
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#4  
PERSONALIZE  
Your approach.



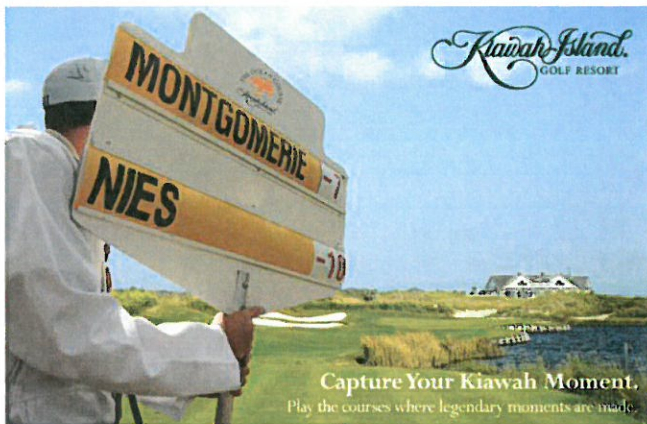
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# EXERCISE & STRETCH



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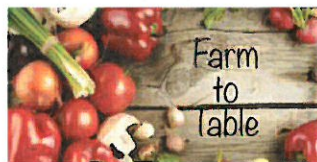
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## #3 VALUE VALUES



Make sure yours are  
front & center.



**Beware:**  
If you're not authentic, it will backfire.

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# EXERCISE & STRETCH



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SUCCESSFUL CLUBS  
COMMUNICATE LIKE



NOT



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COMMUNICATING URGENCY WITH  
**TRIAL/SEASONAL MEMBERSHIPS OR  
NEW MEMBERSHIP CATEGORIES**

- ANNOUNCE FEES/DUES INCREASES IN ADVANCE
- HAVE A CUTOFF NUMBER
- STICK TO A TIGHT TIMEFRAME

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IT WORKS FOR  
**CLUB EVENTS** TOO!

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#2  
F.O.M.O.  
Fear of Missing Out.

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## FOMO - COPYWRITING

- A “once-in-a-lifetime” event.
- “Must-indulge” dining experience.
- “Don’t miss out” on all the fun.
- Get it “before it’s gone.”

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SUCCESSFUL BRANDS  
THRIVE ON  
**SCARCITY**

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Photo credit Donovan Maguigan, superintendent, Stockton Seaview

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## EXERCISE & STRETCH



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#2  
F.O.M.O.

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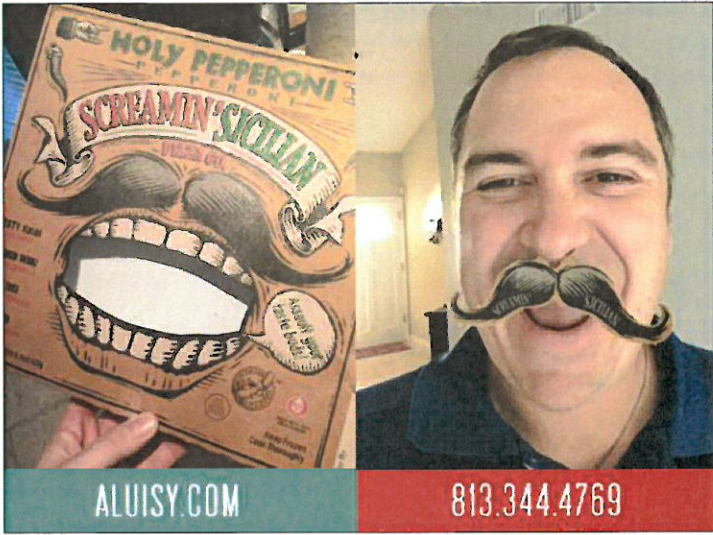
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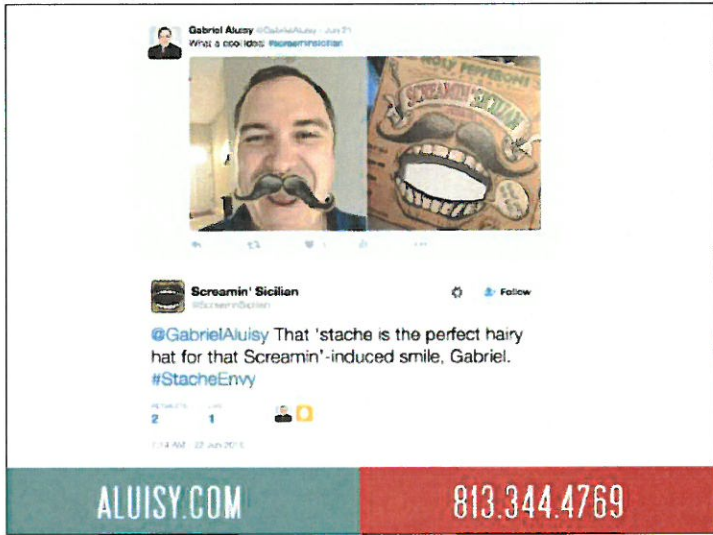
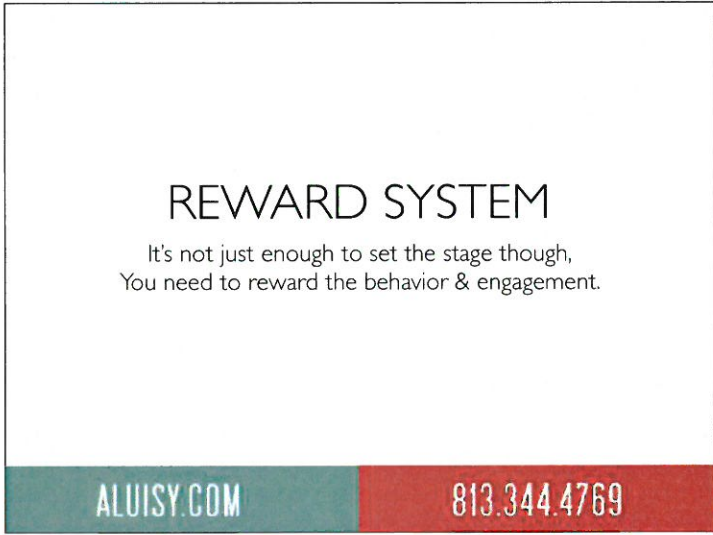
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REWARD SYSTEM

It's not just enough to set the stage though,  
You need to reward the behavior & engagement.



WHY?

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MILLENNIALS OFTEN NEED  
DIRECTION & ENCOURAGEMENT



(A.K.A. spoon feeding)

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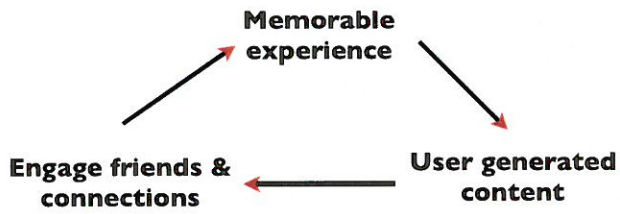


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CREATING MEMORABLE EXPERIENCES  
TRIGGERS THE "VIRTUOUS ENGAGEMENT CYCLE"



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**PROBLEM:**  
60% OF MILLENNIAL GOLFERS  
RARELY / NEVER POST PHOTOS OF  
THEIR ROUNDS ON SOCIAL MEDIA

Source: National Golf Foundation

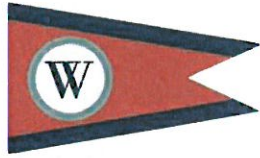
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"PICS OR IT  
DIDN'T HAPPEN"

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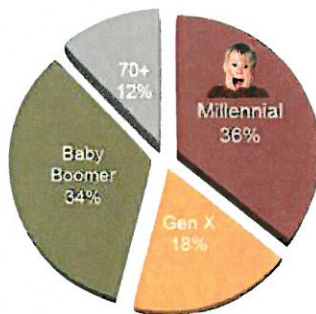
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### ONE EXAMPLE: WINE



WINE CONSUMPTION IN THE U.S.

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Lined writing area for the first card.



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Lined writing area for the second card.



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Lined writing area for the third card.

#1  
EXPERIENCES  
not things!



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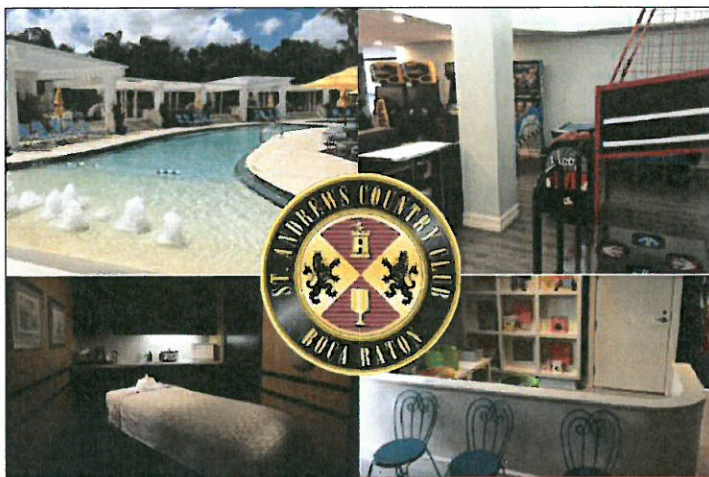
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78%

would choose to spend  
money on an experience or  
event over buying something.

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**Woodland Golf and Country Club**  
 Golf and Social Memberships Available  
**Reduced Initiation Fee**

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- Junior Sports/ Swim Team
- Teaching PGA & Tennis Professionals
- Full Service Clubhouse with Superb Cuisine and Event Facilities

Our Simple Philosophy...  
*"Fun & Camaraderie for the Entire Family"*

**Here is where you belong...**  
 Contact Laura Huckelberry at **846-2588** or  
**lhuckelberry@woodlandcc.com** for more information.  
 100 Woodland Lane, Carmel, IN 46032 • www.woodlandcc.com

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**Lima Country Club** CLICK HERE  
**585-624-1490**

Home of Island Oaks & Charleston Pines  
 2 - 18 Hole Championship Courses  
 Adirondack Style Club House  
 Serving Lunch & Dinner Monday - Friday  
 Friday Night Fish Fry & Full Dinner Menu  
 Banquet Facility • Weddings • Parties  
 Tournaments • Special Occasions - up to 225 People

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**Briarwood Country Club** *Founded 1966*

*Briarwood Country Club is a private, member-owned Club that offers outstanding golf, swimming, fishing and dining facilities. Conveniently located on Hwy 39, just a few miles north of Meridian, Briarwood is also nearby to several attractive residential communities that feature homes of many styles and values. Briarwood is defined by its 18-hole golf course, a large outdoor pool and a great dining venue that provides a wealth of opportunities to play with old friends and make new ones.*

308 Briarwood Road • Meridian, MS 39305  
 601-681-6183 • www.briarwoodcc.org

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**Governance**

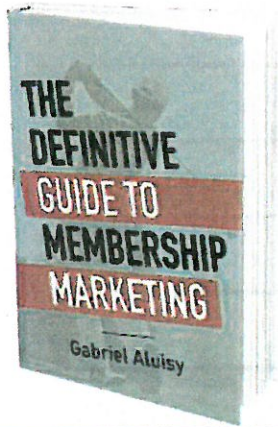


(FORWARD THINKING) CLUBS ARE GOING OUT AND GETTING YOUNGER MEMBERS ON THE BOARD AND IN COMMITTEES SO THERE'S A VOICE AT THE CLUB.

- **Michael Braidwood, Director of Education CMA Europe**

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THERE'S MORE  
**INSIDE**

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**CHEF CHARLES M. CARROLL, CEC AAC HGT**  
*Past President, World Association of Chefs Society*

Award winning author of *Leadership Lessons From A Chef: Finding Time To Be Great* and *Tasting Success "Your Guide to Becoming a Professional Chef,"* and newly published, *"The Recipe,"* Chef Carroll is currently the Executive Chef of River Oaks Country Club, in Houston Texas. River Oaks Country Club enjoys the reputation of being one of the top Country Clubs in the United States. The Club has 1700 members and 75 culinary team members.

Chef Carroll was Executive Chef at Oak Hill Country Club from 1996-2000. Oak Hill Country Club is rated the number seventeenth Country Club in the United States and is home of the Ryder Cup, U.S. Amateur, U.S. Open, U.S. Senior Open, and PGA Championship.

Before Oak Hill, Chef Carroll was Executive Chef, and employed at The Balsams Grand Resort Hotel for thirteen years. The Balsams is a four-star four-diamond resort located in Dixville Notch, New Hampshire. He also served as Apprenticeship Coordinator for one of the country's leading apprenticeship programs.

Charles is a 1985 graduate of the Culinary Institute of America. He served as a Coach for the 2008 United States Culinary Olympic National Team, his seventh Olympic Team. Other teams have included 2004 Manager of the United States Regional Team which captured third in the world and the best in the world Category B, Team USA 2000 national team which received 4 gold and one silver in the world Culinary Olympics held in Germany, ACF New England Olympic Team in 1988, which won more gold than any other regional team; Team USA Northeast 1992, which placed number two in the world; Team USA National 1993, Basel Switzerland, which placed third in the world; and was Manager of Team USA National Apprentice Team, which placed number two in the Taste of Canada Competition.

Charles has received over ninety national and international awards, including chapter Chef of the Year in 1988, 2005 and the American Culinary Federation President's Medallion four times from four decades (1989, 1999, 2005 and 2014). He received the Central Regional "Good Taste Award" in 2006 and Sharing Culinary Traditions Award from the American Academy of Chefs as well as the regional and national winner of the Chef's professionalism Award in 2008. He has been nominated twice for ACF regional Chef of the Year. In 1993, Charles was selected by The James Beard Foundation as one of the Great Country Inn Chefs and was awarded Educator of the Year by the ACFEI. Since the year 2000, he has been inducted into the World Master Chefs Association (2000), the American Academy of Chefs (2001), the Confrerie de la Chaine des Rotisseurs (2002), and the Honorable order of the Golden Toque (2005).

As a professional speaker, he has been a guest at hundreds of events to include ACF meetings, regional and national conventions, as well as culinary classes, colleges and universities, and multiple private and public businesses and corporations.

Chef Carroll served on many Boards and Committees to include; President to the Board of Trustees of the LeNotre Culinary Institute, Secretary Treasurer of the Les Amis d' Escoffier Society Houston, appointed

chairman of ACF certification appeals committee (2008) and appointed chairman of the World Association of Chefs Society (WACS) world congress held in the year of 2012 in Daejeon, Korea and Norway 2014. In 2015 he was inducted as an honorary member into the Indian Federation of Chefs Association (IFCA), The Chefs Association in Argentina and The Northern Chefs Clubs of Greece. In 2014, Chef Carroll was named Vice President of World Association of Chefs Society, an organization that encompasses over 10 million chefs and 100 countries, then in 2015, Chef Carroll was named President and served in that position for 2 years. He currently sits on the Worldchefs Board as Past President.

Chef Carroll has also had the pleasure of being honored at several colleges and universities. He is the recipient of the Distinguished Visiting Author Award presented to him by Johnson and Wales University, as well as Distinguished Visiting Chef by Sullivan College and honored by Grand Rapids Community College, New England Culinary Institute and Paul Smiths College; and received the Lifetime Achievement Award by Cordon d' Or and the Crystal Icon Award by the International Special Events Society. He was most recently awarded with the title of Ambassador for the Culinary Institute of America (CIA).

One of Chef Carroll's most proud moments was creating and producing "Operation HOT" (Honoring Our Troops) in 2011, and again in 2013. Chef Carroll put together a team of 21 celebrities and support team, raised \$450,000, assembled 30,000 lbs of show gear, produced a total of 8 shows, 2 of which were Vegas Style, and fed 8,000 troops a home cooked meal in the middle of a war zone in Afghanistan. For his collective efforts in organizing these events, Chef Carroll was recognized by 5 past U.S. Presidents, and invited to the White House. In September of 2013 he was presented with The Honorable Order of Saint Martin Award, given to him by the Army for his significant contributions to soldiers based in the Middle East.

Chef Carroll takes pride in mentoring students due to which he has written the award winning "Leadership Lessons from a Chef, Finding Time to be Great" and "Tasting Success, Your Guide to Becoming a Professional Chef". He has most recently published his 3<sup>rd</sup> book, "The Recipe", on shelves October 17<sup>th</sup>, 2017.

Chef Carroll has spent the past three years traveling around the United States and the world to include Ireland, Norway, Germany, Switzerland, Iceland, Portugal, Turkey, Chile, Korea, Paris, South Africa, Afghanistan, Greece, India, Hong Kong, Malaysia, Singapore, Macao, and Canada mentoring, sharing and presenting his messages to culinary students, chefs, industry professionals and executives as well as the United States military personnel. His influence and inspiration has helped thousands of individuals reach their full potential and strive to be the best they can be.

For more information about Chef Charles Carroll, please visit [www.chefcharlescarroll.com](http://www.chefcharlescarroll.com)



Seven-Time Culinary Olympian Award-Winning Author & Inspirational Speaker

[www.chefcharlescarroll.com](http://www.chefcharlescarroll.com)

OCTOBER 17th

The Recipe Podcast  
Celebrity Secrets to a Successful Life

TASTING SUCCESS

the recipe

Like Us On: @chefcarroll

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**“The Essence of Greatness”**

CMAA- New York, Greater Cleveland & Pittsburg Chapters  
October 8<sup>th</sup>, 2017

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What’s our focus today?

**PART 1** Better Manager  
Better Employee  
Better Person

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**PART 2** Team Environment

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**What You Look For, You Will Find**  
**What You Find, You Will Attract**  
**What You Attract, You Will Ultimately Become**

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**Destiny**  
**FAB**



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**LOOK: Your Chance In Life**



**Lesson of LOOKING**



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**Great Thinker**

**First Think Great, To Be Great**  
**Think Negative, Negative Things Will Happen**  
**Positive Thinking Attracts Positive Energy**



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AS YOU BECOME MORE SUCCESSFUL...

Negativity / Challenges

Increase? / Decrease?



Earn Less / Do Less / Have Less

*Cliff Charles*  
A Career Coach  
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How To Find  
Inspiration

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DREAM

Listen to Your Dreams!

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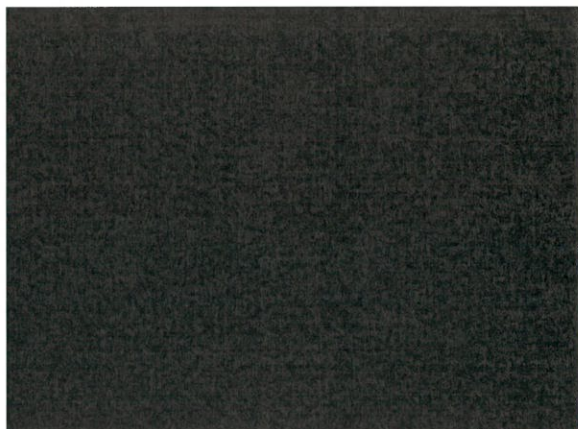
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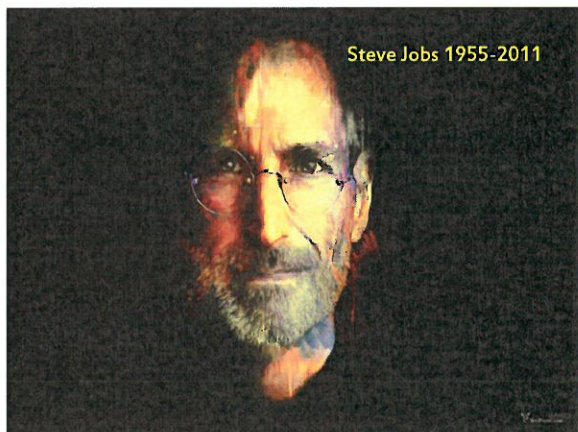
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**Dreams**

Go Outside Your Comfort Zone!

Dream Bigger Than You

Don't Waste Your Time Living Someone Else's Dream

*Cliff Charles*

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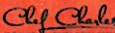
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Find Your Purpose! What Is Your Plan?  
  
Who Are You?...  
And What Were You Meant to Be!!!!  
  
Find "That Thing"!  
Blessed- Yes! Lucky- No



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Work Like A  
Champion



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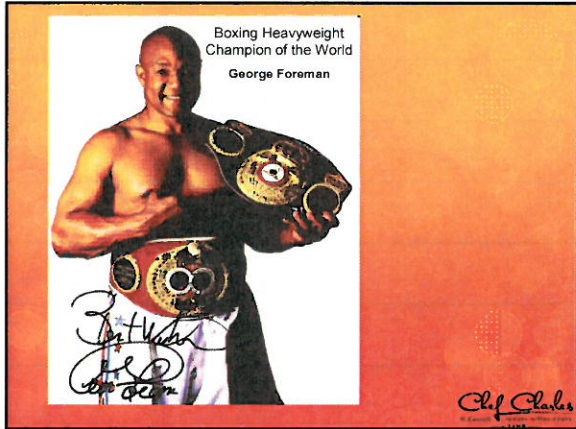
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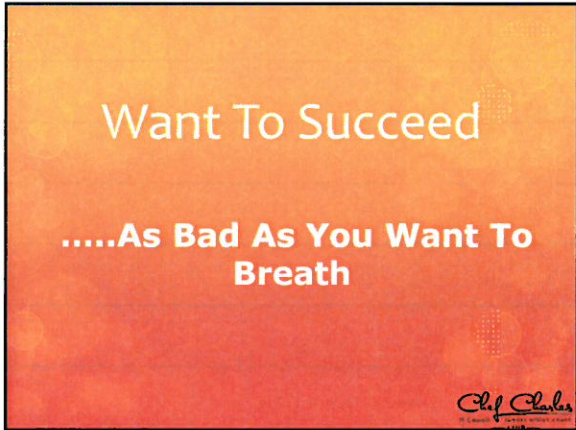
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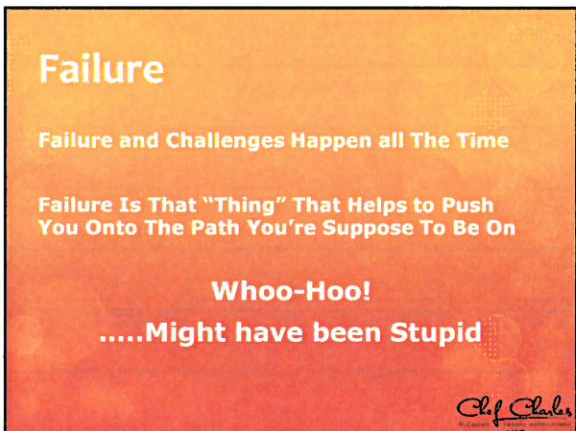
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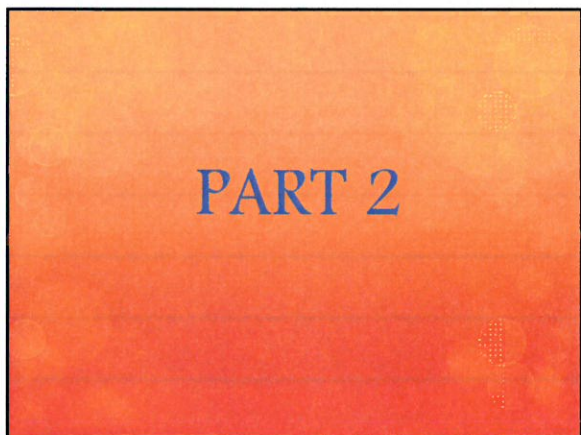
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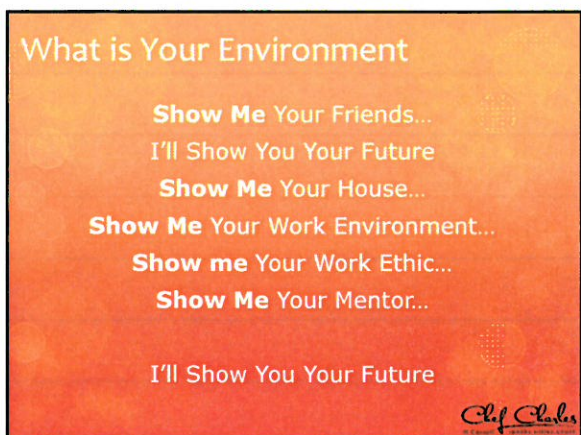
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**What Does This Equate To?**

Taking Care of Our People

Taking Care of Our Environment



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**How to Hire Great Employees**

Get them to "Want to Work For You!"

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**What Is Your Environment**

The Environment Dictates Expectations

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### Inspect Your Current Environment

- Sanitation
- Uniforms
- Employee Meal, Employee Areas
- Lighting



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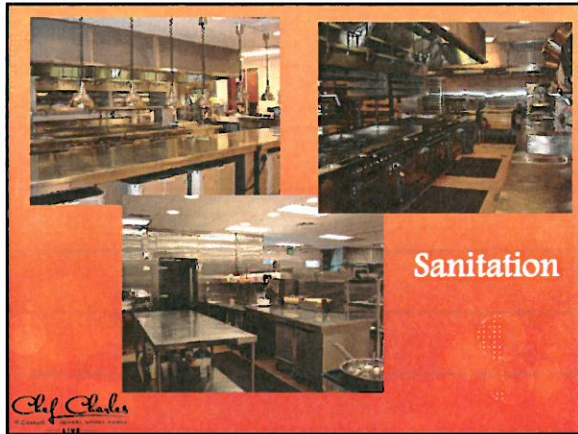
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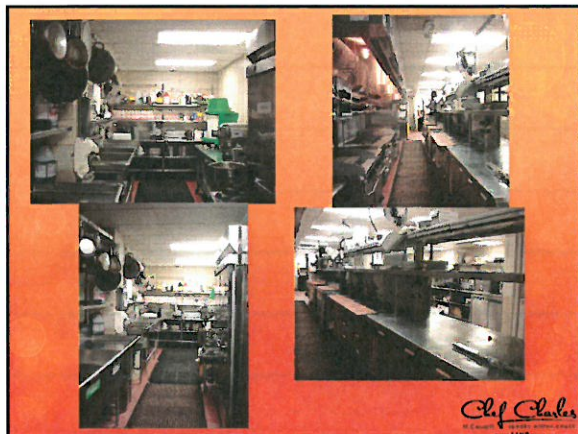
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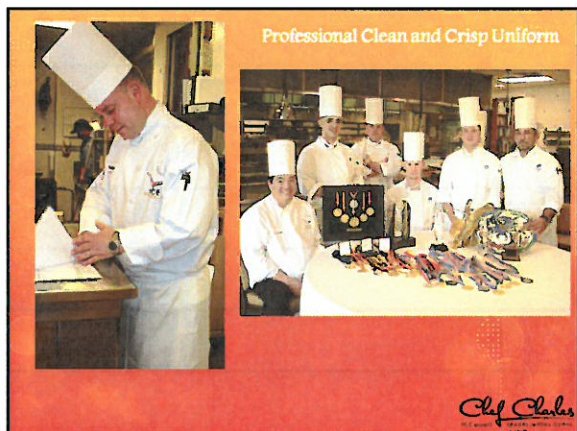
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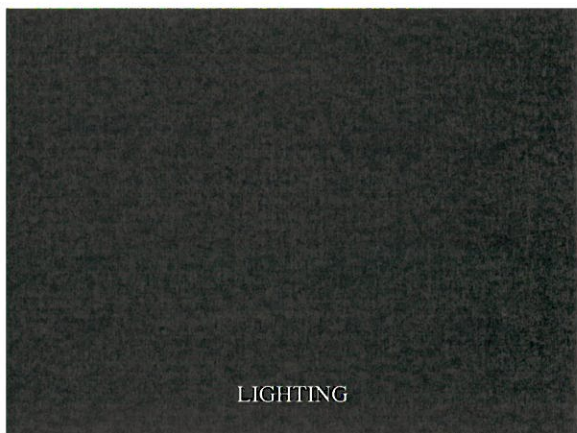
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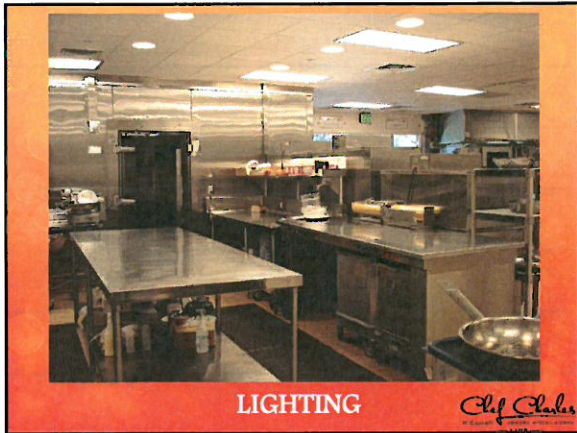
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**Incentive Programs**

- Employee Areas, Family Meal, Computer Access
- Employee Discount Program  
→ In and out of house.
- Employee Purchasing Program
- Name and Face Recognize Programs
- Purveyors Baskets
- Gold Program, Dinner for 4, Sports Tickets
- Letters to Parents
- Relieve Their Shift, Send Home Early
- Exercise Programs, "Biggest Loser"
- Quarter Excellence Award Programs
- Chef's Party
- Theme Parties and Holiday Parties Within Your Department

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**Just Do Something!**

*Chef Charles*

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## Sales Tool



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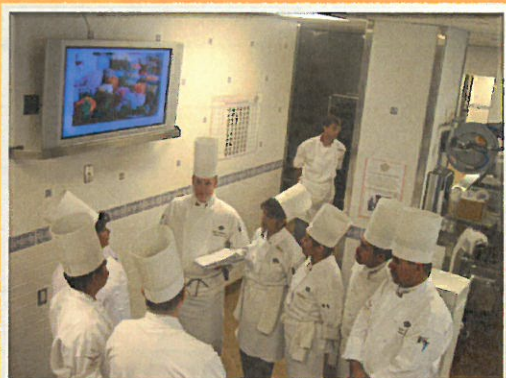
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## Sit Downs

*Chef Charles*  
© 2017

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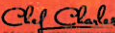


○ Shooting Stars

○ Rising Stars

○ Falling Stars

○ Fallen Stars



The image shows a vertical rectangular box with a gradient background from light orange at the top to dark red at the bottom. It contains four bullet points, each with a white circle and the text 'Shooting Stars', 'Rising Stars', 'Falling Stars', and 'Fallen Stars' respectively. A small logo for 'Cliff Charles' is in the bottom right corner.

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○ Shooting Stars

○ Rising Stars

○ Falling Stars



The image shows a vertical rectangular box with a gradient background from light orange at the top to dark red at the bottom. It contains three bullet points, each with a white circle and the text 'Shooting Stars', 'Rising Stars', and 'Falling Stars' respectively. A small logo for 'Cliff Charles' is in the bottom right corner.

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Choose To  
Influence  
People



The image shows a vertical rectangular box with a gradient background from light orange at the top to dark red at the bottom. It contains the text 'Choose To Influence People' in white, centered. A small logo for 'Cliff Charles' is in the bottom right corner.

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Don't Forget  
To  
**GIVE**



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Nothing Changes  
Until **YOU** Change  
Find Your Purpose



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Be A Blessing  
To Somebody



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**“THANK YOU”**

*Chef Charles*  
M. Carroll speaks. writes. cooks  
**LIVE**

[www.chefcharlescarroll.com](http://www.chefcharlescarroll.com)

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*Chef Charles*  
**LIVE**

Seven-Time Culinary Olympian Award-Winning  
Author & Inspirational Speaker

[www.chefcharlescarroll.com](http://www.chefcharlescarroll.com)

COMING SOON

**the recipe**

Like Us On:    @chefcarroll

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Jeffery J. Downs is one of FranklinCovey's practice leaders in the 4 Disciplines of Execution. He specializes in working with executive teams in both private and public organizations to execute on their top strategies. Jeff has had numerous years of executive leadership experience and record-breaking results.

He has consulted companies such as Intel, CISCO, Boston Scientific, MSNBC.com, Husky Energy, Payless Shoe Source, Staples Promotional Products, Otto Bock, Trimble Navigation, TEP, State of Colorado, and many more. Each of these organizations have experienced tremendous success implementing and using the 4 Disciplines of Execution.

Jeff has also had leadership roles in Fortune 500 companies as a regional director, general sales manager, and general manager with responsibilities in operations, sales, and marketing across North America.

He most recently left Best Practice Systems, Inc a successful eBill business he started with two partners and using principles outlined in the 4 Disciplines of Execution, in just under seven years, lead the company to unprecedented growth earning the status of one of the 500 fastest growing companies in America.

In growing Best Practice Systems, Jeff worked with senior business leaders in companies such as Blue Cross Blue Shield, Graybar Electric, Stericycle, Glaxo Smith Kline, Allscripts, Eastern Propane and Oil, Davey Tree, City of Scottsdale, and many others on how to optimize business systems, increase profit, and improve customer satisfaction.

As a leader in the 4 Disciplines practice, Jeff is asked to speak often to thousands of individuals in large corporate events and facilitate strategic goal setting with executive leaders of Fortune 500 businesses. Without fail, after hearing Jeff speak or facilitate, organizations in hospitality, insurance, healthcare, government, financial, technology, and general business, come away with a new way of approaching what is wildly important.

Jeff has been married for 24 years to his sweetheart, Jami. He is the proud father of seven children between the ages of 4 years and 21 years old. He is a fitness enthusiast with a passion for running completing 2 marathons, 13 half marathons, and scores of smaller races. He is also an avid reader of fiction and non-fiction alike.







TO BEGIN *EXECUTING WILDLY* IN **YOUR** ORGANIZATION,  
PLEASE CONTACT A MEMBER OF THE TEAM:

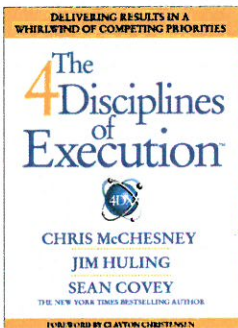
**Justin Gasbarre**  
Associate Client Partner, Franklin Covey  
c. 412.613.8356  
Justin.Gasbarre@FranklinCovey.com



# The 4 Disciplines of Execution™



# The 4 Disciplines of Execution™



"The 4 Disciplines of Execution offers more than theories for making strategic organizational change. The authors explain not only the 'what' but also 'how' effective execution is achieved. They share numerous examples of companies that have done just that, not once, but over and over again."

**Clayton Christensen, Professor, Harvard Business School, and author of *The Innovator's Dilemma***

"What Six Sigma and Lean are to manufacturing, *The 4 Disciplines of Execution* is to executing your strategy. 4DX is a practical methodology that can solve every leader's #1 challenge: execution."

**Ram Charan, Co-Author of the Best Selling *Execution: The Discipline of Getting Things Done* and the author of *What the CEO Wants You to Know***

"In a business world where the essence of leadership centers around strategy, this book highlights the true requirements of any organization to focus on the principles of execution. At The Ritz-Carlton, I believe the only way to strengthen operational excellence is through flawless execution. The application of Focus, Leverage, Engagement and Accountability, as discussed in *The 4 Disciplines of Execution*, are key to our success and make exceptional reading for today's business leaders."

**Herve Humler, President and Chief Operations Officer, The Ritz-Carlton Hotel Company**



## WELCOME

Thank you for joining us today!

FranklinCovey has spent over a decade researching and surveying almost 300,000 leaders and team members on challenges with strategy execution. This research has been valuable as a foundation for the principles and in guiding our early conclusions, but the real insights did not come from research or surveys. They came from working with people like you in over fifteen-hundred implementations. This effort is what enabled us to develop principles and methods that we know will work regardless of the industry or the nation in which they are implemented.

The 4 Disciplines of Execution enable leaders and their teams to break through to higher levels of performance by providing:

1. Precise focus on the most important objectives (Wildly Important Goals).
2. Definitive actions that enable teams to establish a standard for performance (lead measures).
3. Clear measurements for performance (scoreboards).
4. Team and individual accountability.

Although the disciplines may seem simple at first glance, they are not simplistic. They will profoundly change the way you approach your goals.

We anticipate that you will leave today's session with a clear understanding of why execution breaks down in many organizations and how the 4 Disciplines of Execution can help leaders not only raise performance to a new level, but also to sustain it.





## DISCIPLINE 1: FOCUS ON THE WILDLY IMPORTANT

NUMBER OF GOALS									
GOALS ACHIEVED WITH EXCELLENCE									

### Wildly Important Goal

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### Key Principle

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### X to Y by When

"X"	"Y"	"By When"
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### Cost Savings

ORGANIZATION	RESULTS
State Human Resource Department	Received \$4 million benefit from reduction in food stamp error rate.
Metropolitan area hospital	52% reduction in peri-operative incidents.
Large pharmaceutical company	Reduced quarterly product pricing implementation schedule from 15 to 8 days increasing sales by \$10 million annually.
State Department of Family & Children Services	60% reduction in recurrence of substantiated child maltreatment (across the entire state) in 8 months.
One of the world's largest carpet manufacturers	50% reduction in six-sigma project completion time.
1,300 employee mail and package delivery public agency in the mid-west	25% reduction in overtime pay saving the division \$314,084 within 12 months.
Synthetic materials manufacturer	\$500,000 savings in production cost and a 90% reduction in customer complaints in 2 years.
State Department of Human Resources	\$1.5 million dollar savings in annual automobile insurance premiums vs a direct result of reduction in automobile accidents with state transport vehicles from 546 to 309 to 100 over 3 years.
10th largest pharmaceutical company in the world	Implemented supplemental rebate reduction efforts and achieved \$570,000 in annual savings.
State Department of Corrections	\$60 million savings in operating improvements.
Global power producer	\$3 million cost savings with High Horse Power (HHP) service division within 3 months.
Multi-campus medical center	45% reduction in storage expense by digitizing and destroying 10,000 medical records.
International pharmaceutical manufacturer	Identified and addressed product rebate saving issues generating \$6 million in annual savings.
Multi-state electricity provider	Cost of capital savings of approximately \$47 million over 3 years.
2,600 acre foliage and plant bedding business	Increase preventative maintenance from 50% to 92% creating a cost savings of over \$600,000 within 10 months.

### Employee Engagement or Customer Service

ORGANIZATION	RESULTS
Cleaning products manufacturer	\$2.5 million reduction in controllable cost to manufacture.
One of the world's largest grocery store chains	Increased customer engagement scores from 51% to 74% in 6 months in Southeastern Zone.
Mid-western state hospital unit	Increased Press Ganey patient sat percentile from 20th to 60th.
Hotel chain with over 4,000 locations	Manhattan luxury property achieved their highest employee satisfaction in the history of the hotel within 8 months.
200,000 employees Hi-tech manufacturing firms	2 Global divisions of 10,000 employees each, have gone from red to black in less than one year.
Largest hotel in U.S.A. (outside of Las Vegas, Nevada)	21 point (50%) increase in guest satisfaction within 6 months.
Noble-profit healthcare network	Improved in-patient satisfaction from the 26th percentile to the 76th percentile within 4 months.
One of the nation's largest conference hotels	73% reduction in guest reported problems.
International pharmaceutical manufacturer	24% improvement in on-time delivery setting a new record for the manufacturer.

Execution is the most relevant business issue today...

Great organizations are able to actually execute and deliver strategies that produce world-class results. It is this ability to execute that separates the good from the great.

The 4 Disciplines program is a methodology to:

- Achieve world-class, consistent execution of critical goals every time.
- Increase morale significantly while increasing accountability
- Develop your next generation of senior leaders.

### SOLUTION

The 4 Disciplines of Execution: Manager Certification is not just for business strategy development, it gives an organization an operating system for executing on its highest priorities again and again. It enables leaders at all levels to create transparency, accountability and true employee engagement. But most importantly, it delivers results!



## BREAKTHROUGH RESULTS WITH THE 4 DISCIPLINES OF EXECUTION

### BUSINESS EXECUTION

Executing on strategies that require a change in human behavior is a leader's greatest challenge. The 4 Disciplines of Execution enables you to execute with extraordinary efficiency in the midst of a myriad of distractions.

#### Productivity Results

ORGANIZATION	RESULTS
Largest energy provider in Denmark	Improvement in EBIT of 2-4 million Danish Kroners (approximately US \$500,000 to \$1 million, depending on the market prices of electricity at any given moment after six months of implementation).
6,000 person professional services firm	128% increase in offshore coding volume in 9 months.
Mining company that produces 10% of Mexico's electricity	108 % Improvement in EBITDA/21% increase in production/70% reduction in accidents requiring medical attention.
International smelting facility	86% production increase exceeding goal by 4,000 metric tons resulting in an additional \$8 million increase in revenue.
1,000 person heavy equipment manufacturing division	400% increase in EBITDA in one year.
State Bureau of Investigations	Reduced the duration of time to process fingerprints for applicants from 12 to 2 days.
3,000 bed medical facility	40% reduction in patient transport time across all areas within 6 months.
Fast growing call center software company	60% growth in new client acquisitions.
International chemical and compound manufacturer	Grew volume 42% with increase of EBIT to 11%.
512 bed hospital serving 22 counties	173% increase in their Operating Margin.
Global company employing 70,000+ employees	42% improvement in operational performance of Key Service areas within the ETS Technology organization.

The results you see here are a sampling of extraordinary performances from FranklinCovey clients that have implemented *The 4 Disciplines of Execution* through the *4DX Manager Certification Process*.

## DISCIPLINE 2: ACT ON THE LEAD MEASURES

Lag Measure

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Lead Measure

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### Two Characteristics of Lead Measures







# Norm Spitzig

Norm Spitzig, MCM is internationally recognized as an eloquent and visionary spokesman for the private club industry. His groundbreaking book **Perspectives on Club Management** continues to inspire and challenge club directors, managers and students around the world. Norm is also the author of three very funny and insightful books centered around the wonderful world of private clubs, **Private Clubs in America and around the World**, **Murder and Mayhem at Old Bunbury**, and **How Now, Norm's Tao**. Details and ordering information are available at [www.CliveEndiveOgiveIV.com](http://www.CliveEndiveOgiveIV.com) and [www.NormSpitzig.com](http://www.NormSpitzig.com). For further insight into private clubs (as well as acerbically witty political commentary), follow [@ClivetheClubGuy](https://twitter.com/ClivetheClubGuy) on Twitter - where Norm has over 150,000 loyal fans.

Norm's leadership and professional contributions to the private club industry have been varied and significant. Elected a National Director of CMAA in 1989, he served as National President in 1995 – the same year he became one of the six original general managers to earn the prestigious lifetime *Master Club Manager (MCM)* designation.

Norm currently serves as a Principal & Senior Partner in **Master Club Advisors**, publisher of the premier newsletter for leaders in the worldwide private club industry, *Club Management Perspectives*, and now regarded by more and more leaders in the private club industry as a “*general manager executive search firm of choice*”. Norm's Board of Directors' Leadership Orientations and Strategic Planning Sessions have been very well received at national, regional and local meetings of many professional associations as well as great individual private clubs on six continents. He has the singular honor of having been twice named the club industry's “Educator of the Year”.





## “Proven Strategies for Wildly Successful Private Club Governance and Operations”

Presented by: Norm Spitzig, MCM  
Principal & Senior Partner  
Master Club Advisors

Monday, October 9, 2017  
The Duquesne Club

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## A Little About the Speaker and Master Club Advisors

- Brief History and Overview of Firm
- General Manager Searches
- Board Leadership Orientations
- Strategic Planning Facilitation
- Symposiums
- Publications
- Affiliations
- Speaking Assignments

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## Today’s Five Scintillating Topics

- Knowing when—and, perhaps more importantly, when NOT!—to accept that next club management position.
- Three IMPORTANT LIFE-LESSONS that I learned managing clubs—and how they can make us all better people and better club managers.
- Some of my FAVORITE QUOTES from private club leaders—and how really listening to these words of wisdom can make us all better people and better club managers
- What makes a private club truly GREAT!
- The core characteristics of GREAT private club governance.

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**Topic #1**  
"Knowing When—and When NOT!—To Accept that Next Club Management Position"

At some point in virtually every club manager's professional career, a new opportunity will present itself. The fundamental question, of course, is whether or not one should seriously consider or accept the position in question.

This new professional development presentation, designed for ALL club management senior staff, enumerates and discusses **ten** "warning signs" of a possibly "questionable" private club operation and/or potentially "bad fit" between the current governance "style" and the incoming General Manager.

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**Warning Sign #1**

A vague, conflicting or poorly written job description

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**Warning Sign #2**

An overly controlled, overly complex and/or overly lengthy selection process

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Warning Sign #3

Unrealistic expectations on the part of the hiring "decision-makers" (e.g., the Board of Directors, the Search Committee, the Club Owner, the General Manager, etc.)

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Warning Sign #4

Too many people involved in the hiring process

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Warning Sign #5

Disparaging comments being made about current employees and/or the person who previously held the position.

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Warning Sign #6

“Bad vibes” from employees encountered during the candidate’s tour of the club

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Warning Sign #7

A rushed interview process

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Warning Sign #8

No one has spoken with your references

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Warning Sign #9

The refusal to put anything in writing

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Warning Sign #10

No one will show you the financials

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So... What Have We Learned?

The more warning signs that exist, the more likely the club is question is poorly governed.

The poorer the club governance, the more likely the General Manager's longevity will be at risk.

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**Topic # 2**  
"Life Lessons Learned in the Wonderful World of Private Clubs"

This portion of my presentation will focus on a few core principals and personal insights that all club employees and club members can "take to the bank" as a result of their participation in, and familiarity with, the wonderful world of private clubs.

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**Four Stories**

- A Charlotte Bed & Breakfast Stay
- A family outing at the Rain Forest Café
- Lunch in a Hong Kong Restaurant
- Breakfast at Denny's

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**Private Club Life Lesson #1**

"Rules matter... but only to a point."

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Rules Matter... but only to a point

- Club Rules must be consistent, understandable and fairly enforced.
- People join private clubs, in no small part, to get away from the stupid/complex/irrelevant/illogical/uncaring rules that permeate society
- The Golf Club of Stockholm: A case study

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Another Story

The Tale of Copernicus and Galileo

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Private Club Life Lesson #2

"The truth is **independent** of the authority, passion, number of supporters and eloquence with which it is said."

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Three Ways to Prevent a Rogue Director from Leading the Club Astray

- Have **great** governance at your club. (We'll talk about this in detail later today!)
- Understand and embrace **leadership** as it applies to world of private clubs
- Adopt and embrace **strategic plan**.

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Leadership in General – Two Good Definitions

"Leadership is having the personal power to significantly influence a person's mind, body and/or spirit to accomplish goals that they would not normally attempt on their own."

"Leadership is the art of getting someone else to do something you want done – because he actually wants to do it."

- Dwight D. Eisenhower

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Time for a Little Quiz

What do YOU think is the **most important** characteristic for long-term leadership success in the world of private clubs?

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Leadership in the world of private clubs

- Top leadership **traits**: flexibility, passion, vision, and a “good cultural fit”
- Top leadership **behaviors**: organized, financially savvy, visible, **good listener/communicator**, serves as a coach/mentor for the “next generation”

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Three Surveys

- Cornell University: 1980’s and 2000’s
- Michael Leemhuis, CCM: On the Road
- Mitchell Platt, CCM

And the **most important** characteristic for long-term leadership success in the world of private clubs is...

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Private Club Strategic Planning

- A strategic plan is a systematic program for CHANGE over a prescribed period of time - usually 3 to 5 years. More specifically, it is “an integrated set of principles that, if followed over time, will produce a sufficient number of members who are active, vibrant, and socially compatible.”
- It identifies who you are, what you want to be, and how you are going to get there.
- It is not a business plan (although the business plan is a key and consistent part of any good strategic plan).
- It is not an annual budget (although there are surely important budgeting implications for strategic initiatives).
- It is not a marketing plan (although marketing may be one strategy to achieve certain objectives for your strategic plan, i.e. increases membership or membership retention).

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Three Commonsensical Ways of Looking at Private Club Strategic Planning

“Properly ‘positioning’, or ‘re-positioning’, the club in the local market.”

“Properly balancing the kind of club we want to be with the kind of club we actually can be.”

“Choosing the best spot for our club on the continuum between ‘most cost effective’ and ‘the best without regard to cost.’”

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Who Should Participate in Developing a Private Club Strategic Plan

- Strategic Planning Committee Members (which should include a sufficient number of current members of the Board of Directors and respected and influential Past Presidents who are willing to serve)
- Tenured Senior Staff

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The Six Steps of Private Club Strategic Planning

**Step 1:** Conduct independently facilitated member focus groups and/or a professional survey of the membership.

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Suggested Focus Group Questions

1. What type of club do we **really** want to be? How is it different (if it is) from what we are now?
2. What is our club **best known** for?
3. What are we **most proud** of at our club?
4. What is the **core purpose** of our club?
5. How would we best describe the **culture** at our club? Is that what we really want it to be?
6. What are the **top requests for change** that we hear our members asking for?

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The Six Steps of Private Club Strategic Planning

**Step 2: SWOT Analysis:** A candid self-assessment of the Strengths, Weaknesses, Opportunities and Threats for the club.

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The Six Steps of Private Club Strategic Planning

**Step 3: Confirmation/refinement of the Mission Statement** ("the core purpose of \_\_\_\_\_ Country Club" or, in other words, "what the club is").

**Sample Mission Statement:** - \_\_\_\_\_ Club is a private, member-owned full service country dedicated to providing its members, their families and guests with high quality, culturally relevant programs, services and facilities in a manner that values and protects the club's heritage, maintains fiscal responsibility, fosters lifelong friendships and good fellowship, and values and enriches family life.

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The Six Steps of Private Club Strategic Planning

**Step 4:** Development of the Core Values ("the underlying guiding ethical principles reflecting what is truly important to the club and to which the club will always adhere and embrace").

**Sample Core Values:**

- Maintain fiscal responsibility.
- Keep the club's governance structure and rules and regulations in line with current best practices.
- Members and their families are our primary focus.
- Deliver excellence in all that we do.
- Identify and attract members who seek to be engaged in our community.
- Continual improvement of our services and facilities is essential.
- Integrity is never compromised.

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The Six Steps of Private Club Strategic Planning

**Step 5:** Development of the Strategic Objectives – sometimes called the Vision Statement ("a prioritized list of affordable, member-desired, mutually consistent strategic issues for the club—capital expenditures plus other critically important tasks, such as an overall review of the club's governance practices, a comprehensive club rules and regulations assessment, the development of a club membership marketing and retention plan, etc.—that the aligned leadership agree is best for the club, socially and financially in the foreseeable future")

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The Six Steps of Private Club Strategic Planning

**Step 6:** Develop the specific objectives for the club (i.e., "filling in the details".) Mission Statements, Core Values and Vision Statements are typically overarching principles. Objectives, on the other hand, are more concrete and detailed. Objectives are SMART:

- Specific
- Measurable
- Attainable
- Result-Oriented
- Time-Limited

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Okay... Another Story

Al Berk's first hole in one.

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Private Club Life Lesson #3

"You are never too old to try something new."

(Especially in identifying, attracting and keeping high quality new members!)

Everyone here **must** read Gabe Aluisi's fantastic *"The Definitive Guide to Membership Marketing"* and also listen to his weekly Private Club Radio broadcasts!

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Setting the Stage: **Today's** Society from 30,000 Feet

- We live in an "experience" economy (vs. the previous "agrarian" "production" and "sales" worlds).
- People have higher expectations and, as such, want "interactions", not "transactions".
- People have a "time-constrained", "24/7" mentality.
- There's an increased focus on health, wellness, community and longevity.
- There's growing emphasis on "going green" (sustainability).
- Private clubs are becoming increasingly "family-focused", "family friendly" and "family-centric".
- The world is a scary place.
- People want "value" (i.e., the positive difference between the experience and the cost).

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### Joining Trends

- Three Reasons Why People in General Join Private Clubs Today:
  1. A place where the safety and security are paramount
  2. Services and amenities that my entire family can enjoy
  3. Consistently prepared and served high quality food.
- Three Reasons Why Millennials Join Private Clubs Today:
  1. A place that complements and enhances my lifestyle.
  2. A place where connectivity is a high priority.
  3. A place where I can successfully network, both personally and professionally.

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### Baby Boomers: An Overview

- Prefer to communicate via telephone or e-mail.
- Are pragmatic and logical buyers.
- Love "discounts", "deals" and "coupons"
- Are serious brand loyalists.
- Prefer credit cards when making purchases.
- Value fitness environments that are comfortable, familiar and not intimidating.
- Want to be comfortable, familiar and safe.
- Like stability.

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### Millennials: An Overview

- Are digital natives, spending about two full hours a day engaging in social media platforms.
- Shop and purchase online, and nearly always mobile.
- Are highly influenced by their peers when it comes to making a purchase.
- Like to pay using a mobile wallet, PayPal or a debit card.
- Seek authenticity and transparency from sellers, wanting to have collaborative and meaningful dialogue with the brands they purchase from.
- See exercise as a lifestyle choice, and want fitness environments that are inspiring as aspirational.
- Are a group exercise generation.

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Topic #3  
Quotes from VERY Smart People Applicable to  
the Wonderful World of Private Clubs

We can learn a LOT from people we have met in the  
private club management business.

Gregg Patterson's seminar-ending "oath".

These are statements that have made an impact on  
me! I hope you like them as well!"

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Quotes from VERY Smart People Applicable to  
the Wonderful World of Private Clubs

*"If you beat the budget, your enemies can't harm you. If you don't, your  
friends can't save you."* - Ken Brown

*"The secret of being a good manager is to keep those who hate you away  
from those who are still undecided."* - Yogi Berra

*"Sacred cows make the best burgers."  
"Every year slay a dragon."  
"3% are always unhappy. Forget them."*

*"The number of "Good Mornings!" is not limited by any budget. - Achal  
Goswami*

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Quotes from VERY Smart People Applicable to the Wonderful World of Private Clubs

*"It is a **good** club when members seriously consider it as a viable option to visit for social and leisure activities. It is a **great** club when it is the members first option."* - George House

*"There are, and always will be, some people in this wonderful world whose sole purpose in life is to discover and implement new and innovative ways of being offended and dissatisfied."* - From a recent CMAE newsletter

*Our Club's Mission is: "We make people happy."* - Bill Horton

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Quotes from VERY Smart People Applicable to the Wonderful World of Private Clubs

*"The only people in favor of change are babies with poopy diapers."* - George MacKay.

*"People are weird and stuff happens."* - Gregg Patterson

*"I'd rather do the **RIGHT** thing for my members and risk losing a portion of the bottom 10% of the membership rather than do **NOTHING** or the **WRONG** thing and risk losing a portion of the top 10%."* - Jon Clay

*"At the end of the day, people get fired for three, and only three reasons: underperformance, bad attitude, budget cuts."* - A recent **Wall Street Journal** article

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Quotes from VERY Smart People Applicable to the Wonderful World of Private Clubs

*"Be respectful of history but not bound by it."*

*"Our club's golf operation is on entertainment and a great member experience with golf being the vehicle to deliver that entertainment."*

*"Women club members want fashion, fun and femininity."*

*"Be stubborn about the club's strategic objectives but be flexible as to how you get there."*

*"Everyone wants everything free, perfect and now."*

*(All of these quotes are from General Managers I met on my tour of Australia and New Zealand last year with Gregg Patterson.)*

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Quotes from VERY Smart People Applicable to the Wonderful World of Private Clubs

The three rules of "pace of play" at Moore Park Golf Club in Sydney, Australia:

*"This is a golf course, not a doctor's surgery. Don't wait for your 'turn'. If you are ready and it is safe, take your shot."*

*"When did a long distance relationship ever work? Make sure you always keep up with the group in front."*

*"The say that 'practice makes perfect' and they're right! That's why we have a driving range! Keep practice swings to a minimum."*

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Quotes from VERY Smart People Applicable to the Wonderful World of Private Clubs

*"Never forget the vital importance of having one's staff understand the difference between their **function** at the club and their **role** at the club." — John McCranie, General Manager, Cat Cay Yacht Club, The Bahamas*

*"We hold these meetings to discuss problems that never would have occurred if we didn't have so many meetings." — Anonymous*

*"A full and vibrant life **outside** of club management is more of a plus for personal happiness and career success than most people think." — Don Hayes, CCM*

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Quotes from VERY Smart People Applicable to the Wonderful World of Private Clubs

*"It was a sh\*thole, but it was **our** sh\*thole." — A Past President speaking (with affection!) about the old, now-torn-down Tchefuncta Country Club (Louisiana) clubhouse*

*"Now that I am a little older, a little wiser and can take the time to candidly assess my club presidency, I wish I had told more of the crazier club members to f\*\*k off." — A Past President of the Royal Sydney Country Club (Australia) speaking at **her** final Board of Directors meeting.*

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Topic #4  
"What Makes a Private Club Truly GREAT"

Breakout Time!

What do YOU think makes a good private club a **GREAT** private club?

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Five Enemies of Greatness

# Availability

*"Because it is there"* may be an okay reason to climb a mountain, but not to achieve greatness.

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Five Enemies of Greatness

#2 Ignorance

Far too often, many people don't really know any better than *"good enough"*.

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Five Enemies of Greatness

#3 Committees

Nothing destroys a great idea faster than *mandatory consensus*. The lowest common denominator is never a sufficiently high standard.

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Five Enemies of Greatness

#4 Comfort

Why pursue greatness *when you already have it all?*

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Five Enemies of Greatness

#5 Momentum

If you are doing okay for years upon years, you are in a rut. Some people refer to such ruts as their *"careers"*.

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What Makes a Good Club a **Great** Club

1. A Clear Mission and Purpose for Being
2. Well-Maintained Facilities
3. A Knowledgeable, Caring and Appreciative Membership
4. A Sense of Tradition

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What Makes a Good Private Club Truly **GREAT!**

5. Top Management and a Personable, Well-Trained Staff
6. An Appropriate Sense of Selectivity
7. Reasonable, Understandable and Fairly Enforced Rules
8. Forward, Creative Thinking Leadership

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What Makes a Good Private Club Truly **Great**

9. Open, Regular Communication Between Members, Leadership and Staff
10. Appropriate Participation in Charitable, Civic and Professional Activities
11. A Passionate Attention to Detail
12. Fiscal Responsibility

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**Topic #5**  
"The Core Characteristics of GREAT Private Club Governance"

"The single biggest obstacle to a private club being GREAT in today's world is poor, dysfunctional governance."

- Ray Cronin, CEO and Founder, Club Benchmarking

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**Club Governance Defined**

"The framework of rules and practices by which a board of directors ensures accountability, fairness, and transparency in a private club's relationship with its all stakeholders (members, management, employees, government, and the community).

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**Private Club Governance**

"Club boards want accountability for measurable results consistent with the club's unique history, vision, and culture."

- Breck Ray, Past President, River Crest Country Club  
- Fort Worth, Texas

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## Private Club Governance

The three arenas of private club governance are:

- 1) Fiduciary governance
- 2) Strategic governance
- 3) Generative governance (driving alignment among the membership)

(from "*Governance as Leadership*"  
by Richard P. Chait)

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## Great Private Club Governance

- Avoids tactical discussions
- Is comprised of rational, open-minded collegial team players
- Makes decisions based upon **facts**.

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## Governance Trends in Private Clubs

- Smaller-Sized Boards
- Smaller-Sized Committees
- Fewer Committees
- Longer Terms/Tenure for Board Members
- Multi-Year Presidential Terms
- Monthly to Quarterly Board and Committee Meetings
- "Action-Agenda" Board Meetings
- Increase in Number of Clubs with a Strategic Plan
- Increased Consciousness about Succession Planning

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Handout for Discussion

“Summary of Best Practices Roles and Responsibilities among Boards of Directors, Club Committees and General Managers”

- From the *Master Club Manager* Monograph of Mac Niven, MCM

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Final Thoughts

- Consistent, competent ethical performance by all concerned leads to mutual confidence and trust among Boards, Committees, Members and Staff.
- Confidence and trust lead to increased managerial authority and autonomy—and also a better run club.
- Increased managerial authority and autonomy increases the likelihood of an enjoyable, successful and longer tenure for the General Manager and a more enjoyable, less stressful tenure for all Board Members.

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Thank You Very Much!

- I may be contacted at:  
Norm Spitzig  
[normspitzig@hotmail.com](mailto:normspitzig@hotmail.com)  
1-352-735-5693
- Visit [www.CliveEndiveOgiveIV.com](http://www.CliveEndiveOgiveIV.com) and [www.NormSpitzig.com](http://www.NormSpitzig.com) - if and only if you have a sense of humor!

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## **BIOGRAPHY OF BRAD STEELE**

As the National Club Association's chief lawyer and lobbyist, Brad Steele brings a wealth of knowledge from the executive, legislative and judicial branches of government to the position of Vice President of Government Relations and General Counsel.

Brad earned his bachelor's degree in government and politics from George Mason University where he graduated with highest distinction. He then began his time in government by working for the Vice President of the United States, for a Member of Congress and then as a senior staffer with a national political committee.

After many years in politics, Brad left DC to become an attorney. He studied law in England at Oxford University and he earned his degree from the University of Oklahoma.

Upon graduation, Brad opened his own law firm in Indiana where he practiced for over a decade. In addition to his private practice, Brad also served as a county, city and town attorney and as a judge of an Indiana court.

While in Indiana, Brad returned to the political arena as a candidate for the United States Congress and the Indiana State House of Representatives. His Congressional race pitted him against Mike Pence in the primary, where they became good friends. In 2007, Brad joined the National Club Association and has served as the voice of the private club industry on Capitol Hill for the past decade.





## ***Government Matters: 2017 Update***

Brad D. Steele, VP of Government Relations & General Counsel

We all scratch our heads and sigh when thinking about the decisions being made by politicians in Washington, DC. The legislative process is often slow and its impact seems remote. Unfortunately, the policies put in place in our nation's capital can have a significant bearing on your club's success.

As the voice of the private club industry, NCA is actively engaged in protecting and defending the interests of private clubs with leaders in Washington. This presentation will provide an insider's guide to what's going on in Congress and how those on Capitol Hill and in the White House are directly affecting your club's day-to-day operations.

The session's learning objectives will be to:

1. Inform club professionals about the legislative and regulatory measures that are now in place and how to comply with them.
2. Inform club professionals about the impact pending federal legislative and regulatory measures will have on our industry.
3. Provide club professionals the tools they need to help protect our industry's rights with elected officials.





# Government Matters 2017 Update

Brad D. Steele  
VP of Government Relations  
& General Counsel

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## NCA's Mission



- *"To defend, protect and advance the interests and well-being of private social and recreational clubs"*
- As the trade association for the private club industry, NCA is based in Washington, D.C. to do two things:
  - Be involved in the political world, and
  - Shape the policies that come from it
- Simply put, we make sure the private club industry's voice is heard
  - On Capitol Hill,
  - In the agencies,
  - In the statehouses, and
  - In the courthouses

# Today's Roadmap



- Balance of Power
- Regulatory Issues
- Legislative Issues



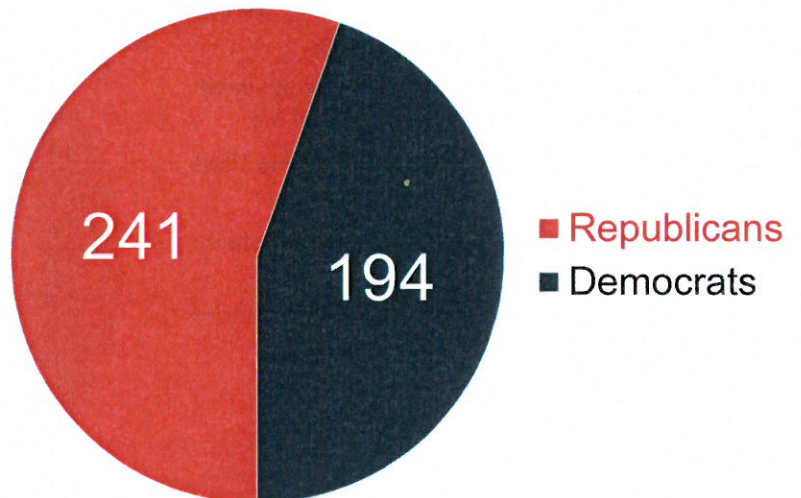
# Balance of Power

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# House of Representatives

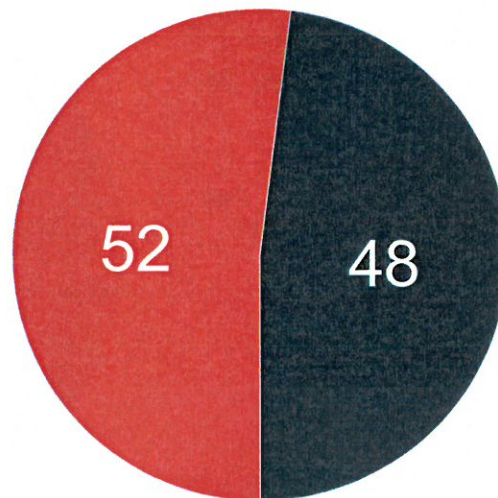
- Balance of power
  - 241 Republicans – 194 Democrats
    - One vacancy – Rep. Jason Chaffetz (R-Utah) retired
      - Seat will stay R
    - Republicans can only lose 23 of their members' votes and still pass legislation



# Senate

## ■ Balance of power

- 52 Republicans – 48 Democrats
  - Without 60 votes, Rs will still be susceptible to Ds filibustering any controversial bill
- In 2018, 25 Ds will be up for re-election and only nine Rs
  - Ten Ds are running for re-election in states Trump won
    - Five of those states he won by more than 19%
  - R margin could increase in two years



- Republicans
- Democrats



# Regulatory Issues

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# Major Regulatory Reform



- Biggest single success of the new administration
  - Executive Order requiring the removal of two rules before one may be added
    - UK 3 for 1, Canada and Australia 2 for 1
  - Appointment of Rep. Mick Mulvaney (R-S.C.) as Director of OMB
    - He is a strong golf supporter and controls all new regulations issued
- Congressional leaders see these actions as changing the way business is done in DC
  - Regulatory Accountability Act – passed the House
    - Removes the Supreme Court's *Chevron* ruling, which requires courts to provide deference to an agency on its rules
    - Limits the size and impact of regulations without broader stakeholder review
    - Sen. Rob Portman (R-Ohio) introduced the Senate version of the bill

# DOL's Overtime Rule



- Rule would have altered who is exempt from overtime pay – federal court stopped it
  - It increased the minimum weekly salary threshold from \$455/week to \$913/week
- Sec. of Labor Alex Acosta has formally requested to remove the rule
  - DOL has requested input from stakeholders as it begins consideration of a new rule
  - He has mentioned a change to \$634/week or \$33,000/year...maybe in 2018
- Remember, there has been no change to the “duties test” for the White Collar Exemptions
  - Clubs must be certain to correctly classify an employee as exempt from overtime pay
    - He must be paid a salary, earn at least the min. weekly salary and fit into one of the White Collar Exemptions
    - To fit into one of the White Collar Exemptions, he must satisfy the duties test of that exemption:
      - Executive – manage a dept., supervise two FTers, and have a say in hire/fire
      - Administrative – perform office work (no manual labor) related to the management of club and exercise discretion on matters of significance
      - Professional – perform work that requires advanced knowledge earned from specialized academic training; **or** artistic or creative endeavors; **or** teaching in an academic institution (not golf or tennis pros)



# EPA's WOTUS Rule



- Rule would have altered the definition of “protected water” under CWA – federal court stopped it
  - “Protected water” included traditional navigable, interstate and territorial water
    - Downstream water also fell under this definition if it significantly affected the chemical, physical or biological integrity of navigable, interstate or territorial water
  - This new rule would have included upstream water, too – so, all water was to be protected water
    - Club ponds, brooks, creeks, etc. would have been under EPA control and permits would have been needed before using chemicals and fertilizers on the course
- EPA Administrator Scott Pruitt has filed the rescission of the rule from the books
  - EPA has requested input from stakeholders as it begins consideration of a new rule
  - We met with his staff to ensure the new rule is fair and legally defensible

# NLRB



- The National Labor Relations Board will become less anti-business/anti-club
  - Five member board comprised of three from the President's party and two from the opposition party
    - Created to resolve disputes between labor and management and oversee union elections
  - There will be a review of some of the more onerous rulings and regulations
    - Ambush Election Rule – return to reasonable election timetables
    - The Micro-Union Rule – return to reasonable bargaining units
    - The Joint Employer ruling – return to reasonable accountability for clubs that use contractors
  - The new NLRB will be focused on returning the board to what it should be – a neutral arbiter
    - It will apply the National Labor Relations Act with balance and fairness now
    - One remaining Trump nominee will be confirmed shortly giving the Board its full compliment of five members

# Employee/IC Classification



- Obama Admin. multi-factor “economic realities” test to classify workers under the FLSA
  - The guidance set out six factors to review:
    - Is the work performed an integral part of the club’s business?
    - Does his own managerial skills affect his ability to make a profit or loss?
    - What are the relative investments in each business by club and worker?
    - Does the work require some special skill or initiative?
    - How permanent is the relationship between worker and club?
    - How much control does the club have over him?
  - No single factor is determinative
    - If he’s in a business for himself, then it’s more likely he’ll be seen as an Independent Contractor
  - Obama DOL stressed “employee” was to be liberally construed, i.e. classify workers as employees
- Trump DOL withdrew this guidance
  - **DOL** will not pursue enforcement actions under it, but others can...



# Employee/IC Classification



- Two federal class action cases filed against clubs – Florida and New York
  - Fla. case settled 7/16 (Streamsong Resort) & N.Y. case is pending (Garden City Men's Club)
  - Case law will establish a precedent
- Reclassify ICs as Employees?
  - Complete control over their work and pay – ambassadors of the club
  - Members expect the club to provide these services
  - Kids serving as caddies expect to be employees & older caddies should
  - Members pay for this service (caddie fee vs. cart fee) – can be tipped employees
- Ensure they are ICs
  - Educate members on their responsibilities (1099s, hiring the caddie, etc.)
  - Tighten IC contracts with caddies – prohibit class action suits and use arbitration
  - Engage third party entities to take on these responsibilities
- We are working with CaddieMaster and the Western Golf Assn. to help clubs deal with this issue

# Legislative Issues

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# H-2B Visa Program



- Major victory for the club industry
  - The program allows foreign workers to come for seasonal work when Americans aren't available
    - 66,000 cap
  - Clubs have been shut out from these workers because of the cap limits
  - The FY17 funding bill provides DHS the ability to open up more H-2B visas above the cap limit
  - NCA and our allies are fighting to get the Returning Worker Exemption (RWE) included in the FY18 funding bill
    - Some in the WH have worked against this though the President's own clubs use H-2B workers



# Tax Reform



- Plan makes major changes
  - Consolidates the seven individual tax rates into three – 10%, 25% and 35%
  - Drops business rates to 15% and allows all pass through businesses to use the 15% rate
    - House plan drops the rates to 20% with a max of 25%
  - Repeals the AMT, Estate Tax, and Net Investment Income Tax
  - Increases the standard deduction to \$12K and \$24K for middle class
  - But, it also removes the deduction for state and local taxes and other unspecified ones
    - The SALT deduction costs the government \$130B each year
    - “Targeted tax breaks for the wealthiest taxpayers” are on the block, but which??
    - The plan does not remove the mortgage interest or charitable contribution deduction, but during campaign he mentioned caps on itemized deductions.....

# Healthcare Fixes



- Full Obamacare repeal and replace efforts are dead
  - Targeted, bipartisan fixes are next
    - STARS Act to resolve the “seasonal worker” and “seasonal employee” definition issue
    - Reporting requirement overhaul
    - Cadillac tax repeal
    - Redefining “full-time” back to 40 hours per week
    - Association health plans
  - Tax reform could impact health ins. premium tax exclusion
    - We are working to keep the exclusion, but wealthy may have a cap...
  - It is unclear just how much of an appetite Congress has to touch healthcare again

# Questions





# The National Club Association

Your Voice In Washington, D.C.

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