

CLUB LEADERS FORUM



MASTERMIND FORUM

SHAPING THE FUTURE OF PRIVATE CLUBS AND THEIR LEADERSHIP

London

APRIL 16 - 18, 2023



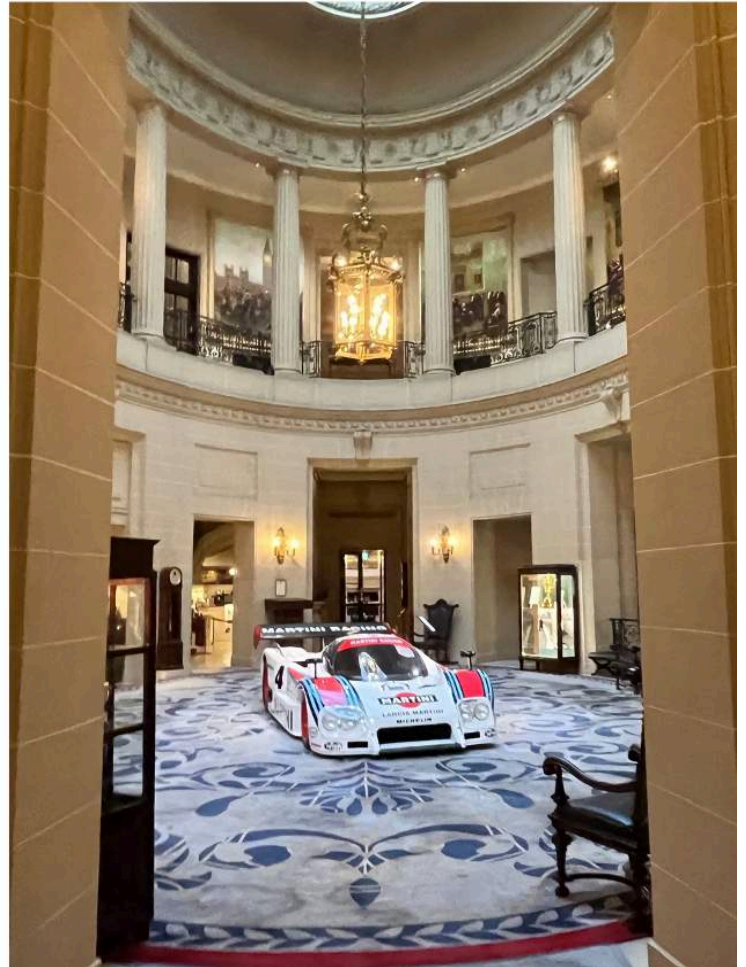
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INTRODUCTION

The MASTERMIND FORUM presented by Club Leaders Forum is designed to invert the traditional conference format and create the “un-conference” experience. Instead of “one-to-many” slide presentations or another lecture on mundane topics, this unique Mastermind format has sparked a transformation in education by fostering idea exchanges focused on optimal strategies and best practices that can significantly impact Platinum Clubs worldwide.

By building each interactive Mastermind session around topics of interest to the participants, the content lets them share and learn from others who possess remarkable yet diverse experiences. The goal of the Mastermind format is to accelerate learning and idea exchange by encouraging participants to share their best practices, lessons learned and case studies far faster than would happen at a traditional conference or cocktail hour. Along the way, the format helps foster stronger relationships between attendees, which pays dividends far beyond the conference.

The Platinum Club Leaders Forum Mastermind Forum was led by Chicago-based innovation and strategic planning firm Phillips & Co.

The following statements, philosophies and opinions were taken directly from the General Managers, CEOs, Secretaries, and Commodores in attendance:

Sarah Ford
The Army and Navy Club

Randy Ruder
Beach Point Club

Michael Newland
The Berkshire Golf Club

Chris Bonvie
Brook Hollow Golf Club

David Balden
The Caledonian Club

Kevin Bonner
The Center Club

Francisco De Lancastre
Finca Cortesin Golf Club

Walter Littlejohn
The Fort Worth Club

Austen Gravestock
The Mid Ocean Club

Miguel Champalimaud
Oitavos Dunes Golf Club

Kevin O'Brien
The Penn Club of New York

Peter Grzan
The Piedmont Club

Paul Munoz Langley
Real Club de Golf Las Brisas

Agustin Mazarrasa
Real Club de la Puerta de Hier

Javier Reviriego
Real Club Valderrama

Stephen Toon
*The Royal and Ancient
Golf Club of St Andrews*

Daniel Pereira
Royal Automobile Club

Vanessa Clifford
Royal Thames Yacht Club

Tristan Hall
Sunningdale Golf Club

Peter Jackman
Terminal City Club

Catherine Murphy
The Athenaeum

Jeff McFadden
The Union League of Philadelphia

John Blanch
Wentworth Club

Ross Matheson
*Wimbledon – The All England
Lawn Tennis Club*

Amber Read
The Yale Club of New York City

The topics and issues addressed in the MASTERMIND FORUM were developed from:

- The Platinum Clubs of America and Platinum Clubs of the World Seven Selection Criteria
- Advisory Board recommendations
- Topics recommended by the attendees
- A survey of Private Club leaders
- Platinum Club licensees

For each topic addressed, attendees were split into groups of four to six and asked to exchange ideas. Upon conclusion, each group highlighted their findings, verbally and in a summary entry to a dedicated website. This report summarizes comments, suggestions, and ideas from the group.

WHAT DO THE NEXT FIVE YEARS HOLD FOR THE WORLD'S FINEST CLUBS?

General Comments

- The top Clubs will prosper but there are tough times ahead for the industry.
- There is a lack of structure in Club Governance which must be addressed to prepare Clubs for rough waters ahead.
- Unless authority and power are transitioned to professionals, Clubs will find the future challenging in a fast-paced and changing world.
- With weak Board Governance, with some Clubs run like a fraternity rather than a business, this is no recipe to position for challenges ahead.
- Unless Clubs continue to evolve, they will struggle.
- The traditional Membership system, which makes it difficult to attract the new generation, will have to be revised.
- Competition will increase from public access facilities, including hotels, public golf courses and Health Clubs.
- There is growing competition from hotels against City Clubs in particular.
- Members now play a lot more golf, which looks like this is the trend, so Members will spend more time at the Club and expect a lot more from the Club and staff.
- Members are now engaged in a more active lifestyle and will demand more from their Club as dues increase.
- There will be a big challenge to retain younger Members as dues are high, and lifestyles are changing.
- Clubs will be swayed to go with the vocal minority - Younger Members currently have a heavily weighted influence in opinions but make up less than 20% of the Membership in most Clubs. Clubs must remember who their core Member is.
- The Club world is evolving rapidly. Many Members belong to several Clubs and expect the same amenities, service and experience in all their Clubs.
- We are in a Club renaissance with more Members joining and existing Members using the Club more. This means the complexity of Members' needs will increase, and we need to be ready.
- There is a conflict between work-life-balance expectations and the needs of a service career.
- Staffing will be increasingly hard to recruit and retain.

THOUGHTS ON THE FUTURE:

- There are tough times ahead that few can predict.
- Clubs need to conserve cash to provide a safety blanket.

- History repeats itself - Research the impacts of Clubs in your area in the 2008-09 time period and educate the Board on the facts that may impact your Club in the next few years.
- Clubs will increasingly cater more to the affluent.
- Strategic Plans will have to be more flexible once adopted and approved.
- Technology will be an asset but could be a threat if not managed.
- Due to growing demand from Members, Clubs will need to expand their offerings beyond traditional amenities to include wellness experiences, amenities, programs and services.
- Wellness and Longevity will become a priority.
- Mental health issues are on the rise.
- Clubs need to determine how AI and the digital world will change the future of Clubs.
- Platinum Club recognition will become more important to validate a Club, the Member experience and as a great place to work.
- AI is here to stay, and we need to see how it will positively and negatively impact Private Clubs.
- Inflation is predicted to be a key factor in the next five years – save your cash now.
- The evolution of Clubs into comprehensive lifestyle destinations will persist, with a shift away from standalone single-purpose facilities, such as a Yacht Club, Golf Club, etc.
- Younger people are willing to play at high-end daily fee courses rather than join one Club.
- Diversity and inclusion: Clubs will need to make sure everyone feels included regardless of gender or race.
- Business centers will become essential facilities, even in the most traditional environments.
- Clubs will become more business and wellness centric, moving away from traditional values.
- As Members spend more time at the Club, it's important to ensure that they can easily engage in a variety of activities and experiences.
- It's almost impossible to predict Membership growth or attrition over the next five years.
- Fixed costs will increase but do not cut service levels.
- To accommodate service staff who seek greater flexibility in work hours, additional staff will need to be hired.
- As we transition toward younger Members and becoming more family-oriented, there will be challenges in striking a balance between the preferences of traditional, longstanding Members and newer, younger Members. However, this shift presents the opportunity to remain relevant and *Adapt to Changing Times*.

- Today, the Club business is solid and seems to be on the rise. However, there are certain challenges, many unknown, that Clubs will face the next five years.
- Be prepared for the unexpected.
- Another pandemic may be coming we need to be prepared this time.
- Technology will be key to supporting Member demand.
- There will be increased demand for personalized experiences driven by data.
- Exclusivity and prestige will become more valuable.
- Make decisions on data driven by technology.
- The success of Clubs will hinge on the ability of their Governors and Managers to better understand their Members through data-driven decision making. The ability to act quickly and efficiently on these decisions will be crucial to the future success of Clubs.
- Communication with our Members will change dramatically – they must evolve.
- We must not lose personal interactions.
- Members' needs and demands are constantly changing, but you must keep them in sync with your Club's ideals.
- Don't lose sight of your brand as the Club evolves.
- Club space must be repurposed.
- Non-revenue generating space must become revenue generating.
- How we communicate will change dramatically with all functions being driven digitally and through phones.
- Food and beverage need to evolve and improve, i.e., less formal, more offers, and more experiences.
- Dress codes will need to be relaxed.
- Clubs will be asked to operate longer hours.
- Inclusivity is a business decision.
- Sustainability will become as important as any other issue in the industry.
- Tradition versus inclusivity will become a challenge.
- There will be constant discussions regarding repurposing areas in and around the Club.
- Digital transformation is coming.
- The next five years will be challenging, especially after suffering a worldwide pandemic where progress was much faster.
- Flexible working is imperative for employees post-pandemic.
- Employees will tell us when they want to work.
- There will be greater staff attrition.
- Robots are coming.
- Unless you are the employer of choice in the local hospitality market, the future is bleak.
- Employees will demand more benefits.
- It will remain challenging to retain and hire exceptional staff.

- The retention of younger employees is becoming increasingly challenging, and this trend is poised to continue.
- There are higher demands from staff who expect more for less.
- More senior managers will suffer from mental health issues.
- Staff must be cross trained in several areas.
- Dues will have to increase 8-10% every year to keep pace with cost increases.
- Staff recruitment might be the greatest challenge for Clubs. Salaries and benefits will have to increase to retain and hire quality staff.
- Sustainability will become as important as diversity.
- Stringent regulations, especially in the UK and Europe, surrounding the use of chemicals in golf course maintenance will likely alter Members' perceptions of what constitutes a top golf course in terms of both appearance and playability.
- Global economics and tensions between countries will shift and potentially affect the Club industry negatively.
- Supply chain issues have stretched the timeline for capital funding projects - do not over promise.
- High inflation will affect Clubs.
- Construction and improvements to Clubs will be a priority, careful planning of these projects will be key.
- The cost of capital improvements will continue to be a challenge.
- Dues will have to increase much more rapidly to keep up the quality of facilities and service demanded.
- Cost and length of capital projects will increase.
- Unless Boards recruit the most qualified Members to serve, their Clubs will suffer.
- Now is the time for management to step up and seize power.
- Clubs will want to cut costs, increase dues and provide more services and a better Member experience.
- There will be more Club mergers.
- Wellness will continue to replace fitness.
- Co working spaces are poised to become a standard offering at top-tier with Members increasingly expecting access to these facilities.
- Cigar bars will become more prevalent and adult-centric amenities.
- Clubs will bond together to form buying groups.
- Clubs will become places to recreate, stay healthy and do business.
- Nine holes will become more popular.
- Come to terms with changes in technology as Members are working in the Club now. Over the past five years, technology has shifted from being prohibited in the Club, to being acceptable.
- Changes in the next 5 years will be greater than in the previous 25 years.
- Inclusion is not one size fits all, it depends on the demographics of your potential Member pool. Be reflective of your Members of the future.

SOLUTIONS:

- Adopt a data-driven philosophy.
- Introduce technology to reduce labor needs.
- Repurpose underutilized and non-income-producing spaces.
- Add more amenities and increase the dues.
- Understand there is a lot of wealth in the world, so do not be afraid to increase prices.
- Make your Club a place to do business.
- Create a 3, 5 and 10-year Strategic Vision.
- Use data and technology around your Members to shape the future of the Club.
- Design the spaces in your Club to fit the demands of your Members.
- Use data of growing Membership to identify their expectations; study available data from your current Members to understand what they want.
- Ask Members how they want to communicate in the future: text, call, app, etc.
- Develop a world-class service team that understands the needs of the next generation and the family lifestyle.
- Teach your staff to be interactive with Membership.
- Hire personalities and teach skills to serve Members.
- Work on best practices to offer the best service while managing high inflation.
- Provide greater mental and physical support and development for your teams.
- Make your Club the best place to work every day.
- Arrange programs for families and children. Parent and toddler Clubs. Think beyond five years to 20 years. Who are the Members of the future?
- "Building your granddaughter's Club": Try connecting the three generations. Grandparents spend seven times the amount on hospitality than parents do. So if you tie in the third generation, you secure your Memberships for years to come.
- Increase the scope of Strategic Planning to longer-term while reducing Committees and Boards, when possible.
- Work to seize power from the Board and be accountable.
- Engage a Long-Range Planning Committee to look at the plans for the next 10-20 years with past Presidents and people who are experts in planning.
- Use outside consultants to support your Club's goals and objectives.
- Increase digital development.
- Focus on transitioning the decisions to the professionals in their fields.
- Utilize the Board/Committees to support your initiatives and projects.
- To the best of your ability, ensure that the Board is diverse.
- Introduce a succession plan at the Board level.
- Train your Board to think in lock step with your vision.
- Balance the potentially competing needs of incoming Members with established Membership - often driven by generational differences.

- Evolving your Club to ensure it is positioned at the highest level from a cultural and facilities viewpoint is necessary. Performance is essential.
- Understand your culture and embrace it.
- Introduce activities and services for the future of younger Members.
- If Members prefer an app, build an app that engages them.
- From Dress codes to fine dining, we need to ensure we deliver.
- Protect tradition with everything you have - but remember being traditional will get you run over. Always think, "what will your granddaughter want or need in her future Club."
- Offer an "Around the World" approach to your food and beverage offerings.

EFFICIENT CLUB GOVERNANCE AND THE BENEFITS OF COMMITTEES

Defining the process to transition from an inefficient to efficient Club Governance structure. Is there a one-size-fits-all structure? Are there any benefits to Committees, and how do you align your vision with Club leadership?

General Comments:

- Move the power dynamic from the volunteers to the professionals.
- Make sure all Committee Members have qualifications to serve, not just Club Legacy.
- Respect that you are Member-owned but convince the Members to give up their power to the professionals. It is not an overnight process. If you are going to change Governance and tradition, you must do it a little bit at a time.
- Valderrama is Member-owned and has no Committees, just one Board of 4 Members that meets seven times per year. Professionals carry out the balance of the decision-making. Running the Club without resistance or the need for explanations is extremely efficient.
- One Club budgeted £100,000 to renovate an entire kitchen. We now have a £1.7M project, and this was done by sharing facts and data with the Board.
- In the event you need Board approval make sure they have facts and data.
- Make your Board accountable and hold them accountable.
- Call out Board Members who make agenda-driven decisions.
- Encourage your Board to use outside consultants.
- Committees can be good or bad; they can provide expertise where you do not have it.

- We are the only industry where the customers run the business.
- It is essential to have the right people on your Committees to have aligned objectives and work well together.
- In our business, criticism is essential across the Board.
- Efficient Governance can only come from efficient people.
- Committees provide the tone; Boards provide marching orders.
- There is a big difference in how younger Board and Committee Members feel about Governance and Club tradition, which is challenging.
- There is a definite trend to smaller, efficient Boards and fewer Committees.
- Educate your Board how efficiently Clubs are run.

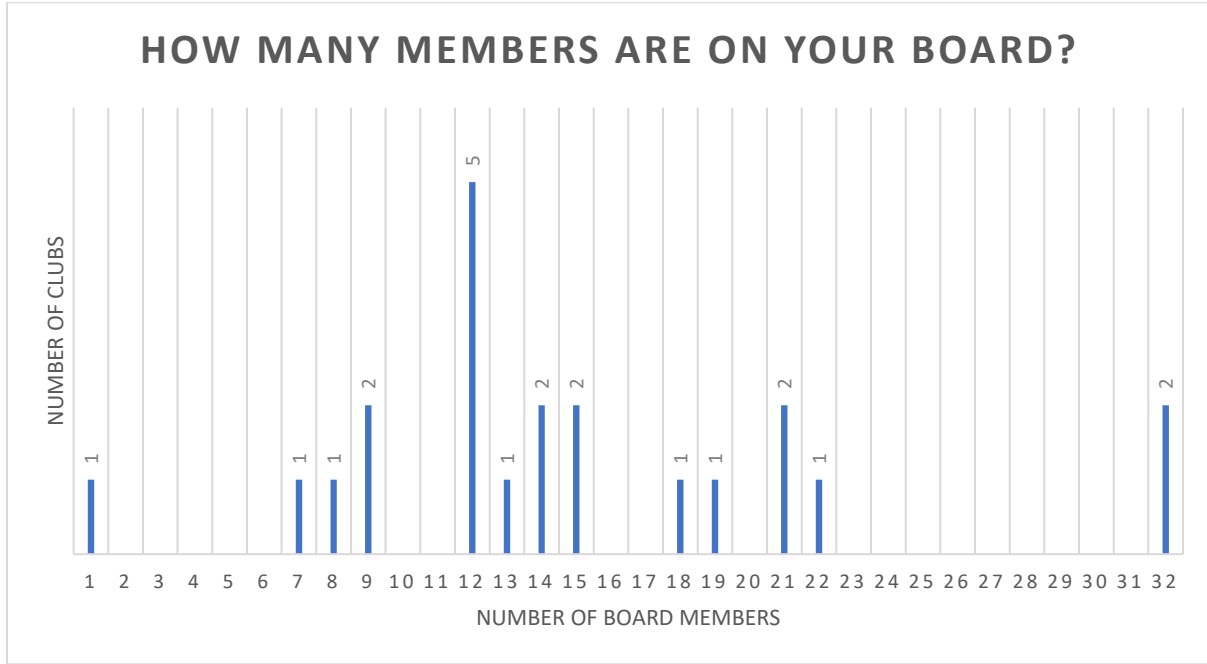
SOLUTIONS FOR EFFICIENT CLUB GOVERNANCE:

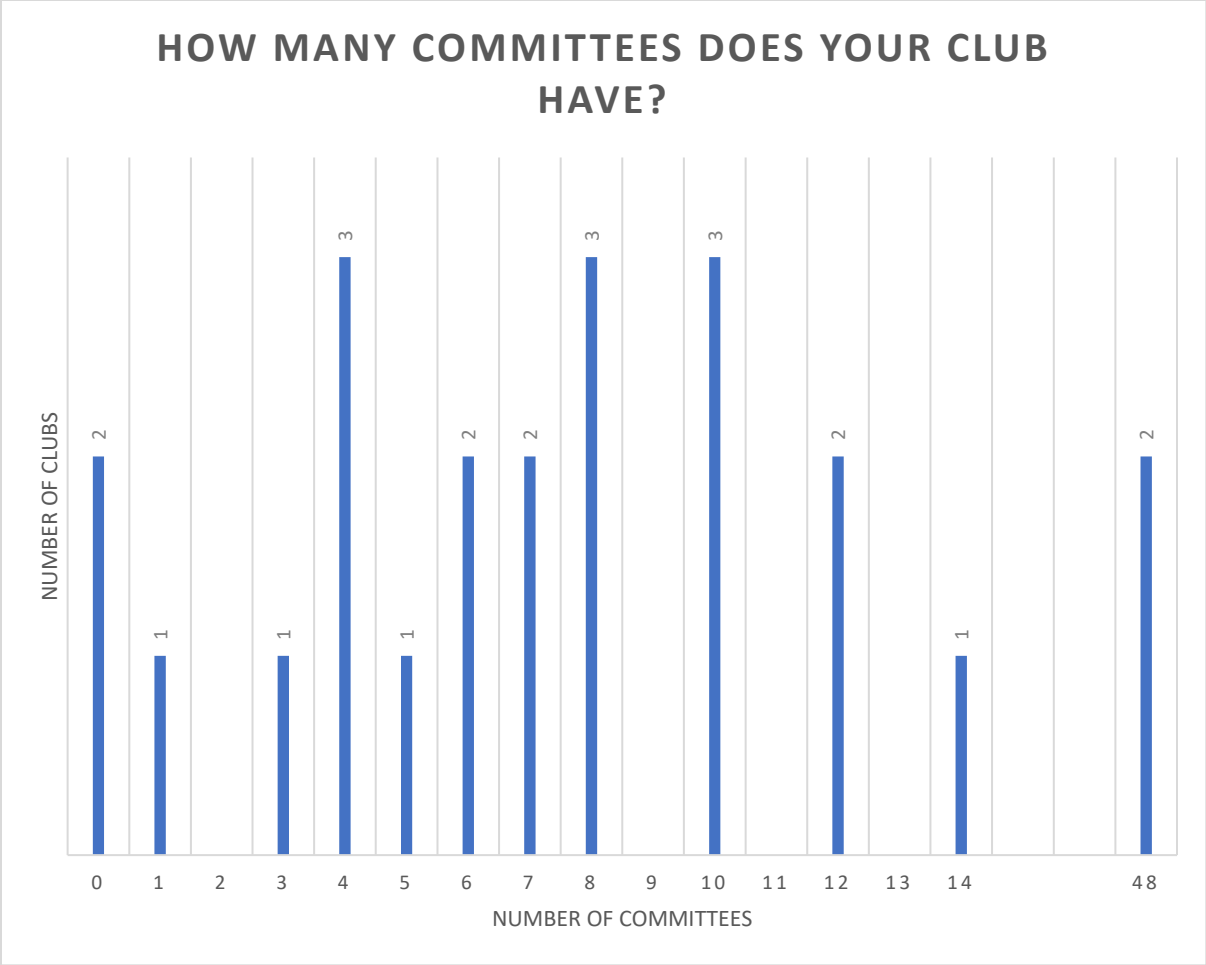
- Limit Committees to five to seven Members and have a minimum of two professionals (on staff) sit on each Committee.
- Transition from being managed by Committees to managing them. When left to their own devices, they can get wieldy. If you manage them, they can become a great asset.
- Rotate your Committee Members and have staff pick them.
- It is important to listen to people early on, making them feel like they have a vote and a say. Let them know their comments are valued even if that is not where we are heading with the Club.
- Make sure the right people will be on your Board three years from now.
- You must drive the succession process for your President.
- Introduce CVs for Committee Members to make experience relevant; allow professionals to make the key decisions.
- Have the Board and Committees sign NDAs.
- Determine where you want to take the Club with your management team and then employ a strategy to get there. Every Committee should be led by Members who have working experience in their area of expertise.
- There is a responsibility on the part of the GM to recruit volunteer Committee Members who have the professional experience to assist.
- The benefit of a streamlined Committee structure is that although decisions can take longer to make, generally, they are the correct decisions and are supported by the Membership.
- Never be the face of a capital project.
- Hire consultants to assist you in any area where you lack knowledge.
- It is important to select the correct Committee Members with Members with experience in fields such as interior design, food and beverage, building, etc.

- It is important to have key staff attending Committee Meetings and for them to have the ability to influence.
- Maintain Member involvement via small Subcommittees.
- Have management staff manage and control Committee meetings.
- Have a process to select Board Members, evaluate them, and add what is missing, not what you have. An easy process for the nominating Committee is to have a yellow, green or red option.
- Getting professionals and the right volunteers on the Committee is crucial.
- Align your vision through constant communications.
- Full trust from the Board to the GM is the key to Club management success.
- Clearly define the responsibilities of the Board and the CEO.
- Conduct detailed and efficient Board retreats.
- Hire an outside consultant to develop your Strategic Plan with the staff and then seek Committee and Board approval.
- If they hire you to be the CEO make sure you have the authority, if you do not, have the power, challenge the Board to give it to you.
- Educate the Board on Governance "best practices" and determine how those will benefit your Club's decision making if implemented.
- Compare and contrast your current Governance model to the best model in another industry.
- Use consultants to help you reach an optimal Governance structure.
- Having a clear view and strategic outlook for the future of the Club is essential when you must work with individuals with different perspectives and ideas.
- You must build relationships with all Members of the Committees, particularly Chairs of relevant Subcommittees.
- Make sure you influence your next three Presidents.
- Use a Member survey to validate your vision.
- Ask the Committee regularly and informally "what they think."
- Write strong proposals backed by data and specifically ask the Board for an approval.
- Make the Committees more ambitious by showing them other experiences.
- There is no "one size fits all," but a strong strategy with defined pillars, milestones and measures across the business, helps the transition and how to say "no" as much as "yes."
- It must be recognized that the Board is a strategic body that does not get involved in the running of the Club but is led by the CEO in alignment with their agreed Strategic Plan.
- Committees are a valuable communication tool that enables the Membership to understand where the Board and leadership are going, they need to champion the direction.

- Use Committees to communicate to Members but don't allow them to make decisions.
- Analyze data, evaluate areas of improvement, and create a Strategic Plan of action.
- There are benefits to Committees, as long as the Governance works to benefit the Club and both management and Committees are aligned with the same consistent vision.
- A benefit of Committees is that they can act as a liaison to the Membership and bring a skillset that not all the professional staff will have.
- A shift of power requires trust and trust takes time to build. Using facts helps smooth this transition.
- Members need to trust you with their Club to transfer responsibility to you and a professional team.
- Committees are a valuable source of knowledge on various aspects of the Member experience and the areas in which they specialize.
- Subcommittees are good if they are the right size with the right people making recommendations for a Board/Main Committee to approve. Spend time working with Committee Members for them to understand the proposals and ensure their support.
- Respect the process while engaging naysayers and controlling the narrative early on.
- Use a matrix to share with your Nomination Committee what you have and what you need. It will get you where you need to be.
- Make sure Club governing documents are relevant, if not make sure they are amended.
- Only allow Members to serve on a Committee if they have successfully proposed a Member to the Club.
- There must be trust in the GM for a full alignment of objectives.
- Efficient people can make efficient Boards and Committees.
- CEOs have an obligation to ensure that proper Governance is implemented at their Club.
- A more corporate model will benefit CEOs and allow them to make decisions with moderate resistance.
- Set term limits for Committees, as they are essential to a functional Governance structure.
- The GM should hold extensive and detailed Board/Committee orientations.
- Update and amend your Club documents as often as required.
- Uncontested Board elections are important.
- Having qualified candidates interviewed and placed on appropriate Committees which align with their professional background and qualifications is a best practice.

- Use data to support white papers.
- Sometimes, shifting the power of the Club to the Board and away from Committees can help the process.





STRATEGIES TO MANAGE INFLATION AND UNCERTAINTIES IN THE GLOBAL ECONOMY

DISCUSSION AND RECOMMENDATIONS:

Raise Dues

We were able to move forward with a 12% increase in dues with only one person pushing back.

- We raised them 10% and have had the lowest attrition rate.
- Higher fees add a certain level of pride, and Members feel they are joining a more prestigious Club.
- The only way to manage global inflation now is to increase dues the price of what Members buy.
- You must decide whether to reduce your standards or raise your prices.

- Members must understand if they want the same standards, Clubs must increase dues.
- There is no need to advertise your increases in terms of percentages. The Members can do the math themselves.
- The staff worry more about dues increases than any Member. If you ask the Members what their dues are, most wouldn't know. We put it straight onto their statement. The more you talk about it, the more you get opposition.
- Have a tiered dues increase based on age.
- Subscription rates are vital to driving revenue, don't shy away from increases.
- New Member revenues drive bottom-line revenue. They are the engine of growth. Use Members to drive new Members.
- Raise service charges and pricing but still deliver exceptional services.
- Quality is the most important issue for Members.
- Maintain standards, as Members will always pay for quality.
- Investment in staff is paramount.
- Some Clubs have a philosophy of maintaining low dues and are content with keeping their current Membership. This approach may not offer sufficient protection during a period of economic decline.
- Determine the percentage of operating costs that should be covered by dues.
- It's crucial to stay ahead of dues increases to prevent having to cut services.
- Without regard for age, charge every Member the same capital reserve fee.

Staff Salaries and Benefits

- Push to increase salaries for staff to keep up with inflation.
- Increasing staff wages beyond inflation allows you to avoid losing key Members of your team.
- Teams need to be paid well to be driven to perform daily.
- Fair pay enables staff to afford to live in the current economic climate.
- To be an Employer of Choice, salaries and benefits must be competitive.
- Better pay longer tenure.
- Retaining tenured staff is essential for maintaining the heart and soul of your Club. To do so, it's imperative to remain competitive in terms of salaries and benefits as staff have many options available to them.
- Allow hourly staff the opportunity to cash their check at the Club.
- Find creative ways to reward staff that does not have a tax consequence.

Other Comments

- The return on your investments from cash deposits is healthy now.
- How much cash should you have on hand for uncertainties in the future?
 - "Mandate to always keep three million in cash or two years' of operating profits.

- Lock in loans now because money is not getting any cheaper.
- Prepare for the worst and expect worse.
- Spend on capital projects now because they will only get more expensive yearly.
- Creating and maintaining a cash reserve or adequately funding an investment account is essential to a Club's longevity.
- Be flexible to operate the business with a different mindset than the one you have been operating with.
- Don't commit to capital projects that cannot be afforded.
- Having a Strategic Plan that addresses inflation in times of uncertainty is essential for Club continuity.

Consider New Revenue Streams

- Open to film crews.
- A Club received £1M from Cartier in exchange for 1 month at the Club, which was closed to Members.
- Incentivize Members to bring in new Members.
- Implement a debenture program: a certificate that can be redeemed after 50 years. You buy a debenture and choose the type of Membership you get. You can redeem the difference minus the joining fee.
- Seek out high-profile banquet and business rental during non-peak periods.
- Invest in capital projects that show the Members you are determined to save money in the long run. For example, solar panels that save almost 70% of the energy consumption, switch the courtesy mineral water to osmosis filtered water fountains, etc.

HOW DO YOU TEACH TODAY'S MANAGERS TO BECOME THE INDUSTRY LEADERS OF THE FUTURE?

SOLUTIONS:

- Recruitment: You must hire the right people. Spend a lot of time on screening and recruiting.
- Lead by example.
- Identify early on if a manager has what it takes to become a leader.
- Define the difference between leadership and management for your staff.
- Provide them an all-round education and give them responsibility but hold them accountable.
- See if they *live to work* or *work to live*. It's difficult to take an employee with a mindset of *work to live* and to create a leader.

- Do not be pressured to hire an individual simply because you need to fill a position.
- Look for qualifications as a demonstration of commitment.
- Members must earn the respect of the staff. We are only as good as our staff. “I encourage all the staff to feel that I am part of their family. I tell them that I am at the bottom of the list and anything that goes wrong goes back to me. Any gaps need to be filled by me to make sure there are no problems.”
- In the hospitality business, when you are hiring staff, choose personality. You can learn any technical skill in hospitality if you have an open mind and are passionate about hospitality.
- Hire personality and teach leadership.
- Demand greater accountability from staff.
- Don't hold staff back. Encourage them to move onward and upward.
- Embrace the game and the theatre of the hospitality business.
- Create a program where staff can spend a week at another Club learning their culture and vice versa.
- Mentor the younger staff and help them achieve their goals.
- Provide continuing education for your team.
- Look outside of the industry to provide experience and training to cultivate leaders.
- Ensure that your staff never stops educating themselves and never stops learning. Give them opportunities to learn outside. Invest in their education.
- As staff become highly skilled at their roles, other Clubs may try to recruit them. While it's important to acknowledge this reality, we should focus on supporting them to the best of our ability while they are on our team.
- Spend time teaching your team how to lead and not follow.
- Have a clear succession plan in your Club so your employees know exactly how far they can advance.
- You are only as good as the head of the departments at your Club.
- Get managers involved in professional associations to get their colleague's perspective.
- Encourage staff to be more well-rounded and add to their skillset.
- To motivate managers and provide opportunities for professional development, it can be beneficial to send them to educational events to network with peers and allow them to see what opportunities are available to them. Be transparent and involve them in decision-making to ensure they feel valued.
- Show interest in your managers personal growth as well; this is especially important to the younger generations.
- Make staff feel they are part of the family.
- Cross-train employees and promote from within when possible.

- Let managers take responsibility and make decisions so they can learn from their mistakes.
- You must understand your employees aims, and their goals. Take care of them and especially know about their family and lifestyle.
- Don't protect sacred cows move them out and on.
- Recruit managers to set examples and make them feel proud of making Members enjoy and feel great due to the services they manage.
- Develop a comprehensive schedule for overcoming any gap in ability and knowledge.
- Invest in your team at all levels. Be genuine and honest as staff will always know if you are not.
- Make yourself available to your employees and transmit your knowledge.
- Implement educational programs to promote and uplift skills.
- Remember, you are managing an entire human being.
- Focus on the succession planning model. You need to ensure that one person leaving the Club doesn't upend the operation or culture.
- Encourage employees to move on if they are getting stale.
- Include staff in decision-making and they will then tell you what you need to do to assist them in progressing their careers.
- When you go into a meeting, ensure you have answers to all the questions that might arise. You gain the respect of others by competence, not with your title.
- Hold managers accountable. This helps them become better leaders.

ATTRACTING AND RETAINING THE BEST TALENT AND ADDRESSING MENTAL HEALTH CHALLENGES IN THE WORKPLACE AND AT HOME

ATTRACTING AND RETAINING TALENT:

- To attract and retain talent, you should have benefits that are among and/or better than the rest of your competitors or nearby resorts, Clubs, etc.
- Hire people with no experience; hire for attitude. Start employees in the back-of-house and give them a clear path forward to the job they desire.
- Consider creating a scholarship program for employees' families and spouses. They can be tax deductible. Establish a foundation and build an endowment. Have a Committee separate from the Board manage the program. The

Committee reviews the applications so that it's not political. Allow Members to include donations on their statements.

- Engage with employees and make them feel special.
- Understand staff members' personal and professional challenges.
- Allow staff to order from the Member menu.
- Hire nice people with healthy minds to preserve atmosphere.
- Adopt a front court/backcourt philosophy: If you're looking for the best players, they are on the backcourt, putting in the long hours.
- Change their life with a surprise trip or other reward.
- When employees work for a Platinum Club, encourage them to wear their pins with pride.
 - "We have had virtually zero turnover ever since we have made sure to keep the Platinum Clubs pins in stock for all employees."
- Reward your team for recruitment.
- Treat people as individuals.
- Show compassion and understand that your employees have a life outside of work.
- Rehire staff that previously left on good terms.
- Use the Gallup employee engagement survey:
 - Leverage anonymous surveys to get the pulse of your staff.
 - Act on the results, address problem areas.
- Use the Gallup Strengths assessment:
 - Make sure you are managing individually to cater to employee strengths.
- Platinum Clubs offer a range of unique benefits for their employees:
 - Give discounts for grocery shopping.
 - Offer healthcare and dental plans.
 - Supply a retirement plan.
 - Provide one extra day's holiday pay if they spend that day doing charitable work and then the Club matches that value up to £500.
 - Make a quiz night every two months.
 - Offer a shuttle bus that makes the commute easier for employees to get to work.
 - Supply games on the lunch tables to encourage employees to have fun.
 - Create an employee gym.
 - Supply healthy menus for employees or feed staff from the Members' menu.
 - Provide a pension plan for employees.
 - Give medals, awards and dinners for milestones in service.
 - Establish an employee reward and recognition program.
 - Offer benefits that assist their entire family (i.e., health programs, college/university tuition assistance).

- Arrange access to golf facilities.
- Offer pet insurance.
- Provide the ability to choose a 4-day work week.
- Allow a 6-week paid leave of absence for new mothers and fathers.
- Grant access to a generous learning and development budget.
- Give them mental health support and counseling.
- Establish a fun working environment: table tennis, pool table, video games, etc.
- Permit them to attend conferences.
- Start a Member-funded holiday fund.
- Offer a \$100 dinner for two on their birthday.
- Give them personalized gifts.

HELPFUL LINKS:

- Gallup employee engagement survey
 - <https://www.gallup.com/workplace/356063/gallup-q12-employee-engagement-survey.aspx>
- Gallup CliftonStrengths assessment
 - <https://www.gallup.com/cliftonstrengths/en/home.aspx>
- Sage app for benefits and accounting
 - <https://www.sage.com/>

MENTAL HEALTH FOR EMPLOYEES:

Today's reality

- “It scares me because we are not trained to deal with mental health problems, and it is scary to be put in a situation where you don’t know how to deal with it.”
- Sometimes it is hard to know if it is a mental health issue or if employees just want a day off.
- Mental health issues occur at home and the workplace, solutions should cover both locations.

Solutions

- “If you’re going to manage a whole person, you have to go to the heart.”
- Provide a phone number employees can call if they are struggling.

- Providing free in-house therapy for staff is a beneficial solution that allows GMs to offer support to employees who may be struggling. It gives employees a discreet place to seek help when needed.
- Allow employees to work from home in exchange for 24/7 availability.
- Enrolling all supervisors in Craig Marshall's 26-week web-based *Mindfulness* program is worth consideration. It has been effective in breaking down the taboo around mental health issues and could enable attendees to discuss it more openly amongst themselves.
- Ask staff what they want. For example, if they wanted to have more fun at work, find simple ways to make work fun. Create a Subcommittee for fun. Give employees a moment of reprieve from the outside world.
- Look outside the industry to see what other people are doing. For example, the PGA tour office has a gym, golf simulator and walking paths.
- Access to a sleep room if needed.
- Organize outings with the staff.
- Providing employees with an additional discretionary day off, often referred to as a "mental health day" could be a positive step, as it enables staff to take time off when needed without negative consequences such as being marked as a no call/no show. Additionally, it can be used as an option for a personal occasion such as their birthday.
- Offer one three-day weekend per month for all F&B employees.
- Create a quiet room or spa for employees.
- Bring in an outside third-party mental health specialist once a week.
- An excellent HR team will be invaluable in spotting issues.

HELPFUL LINKS:

- Mindfulness with Craig Marshall
 - <http://www.craigmarshallconsulting.com/mindfulness-program.html>

PROTECTING YOUR ROLE AS GM, AND NEGOTIATING YOUR COMPENSATION, BENEFITS, BONUSES AND SEVERANCE PACKAGES

TODAY'S REALITY:

- There is still a gap between the US, Europe and UK in terms of pay.

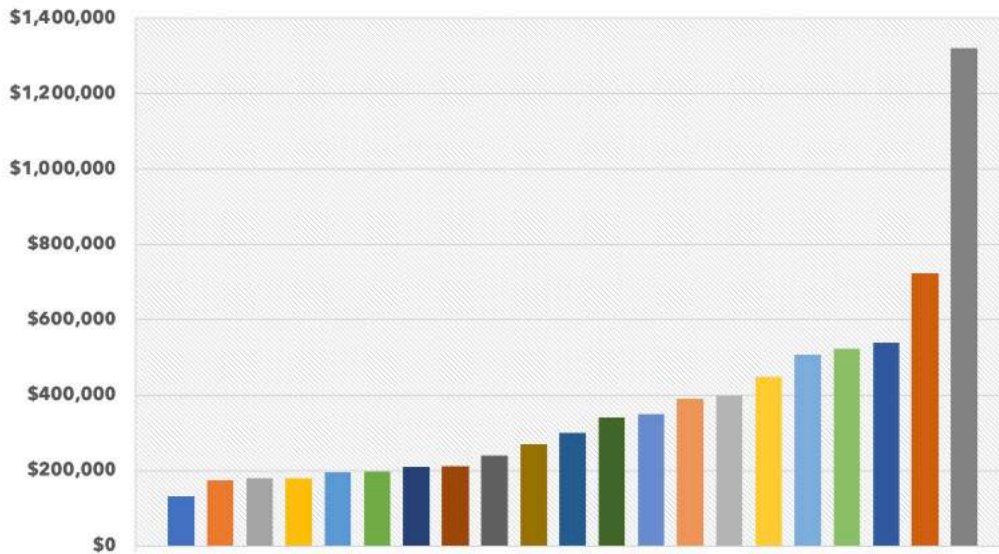
- Top Club managers are rare so do not be afraid to demand fair compensation.
- Most managers do not use an executive compensation coach but instead, negotiate their own packages.

RECOMMENDATIONS:

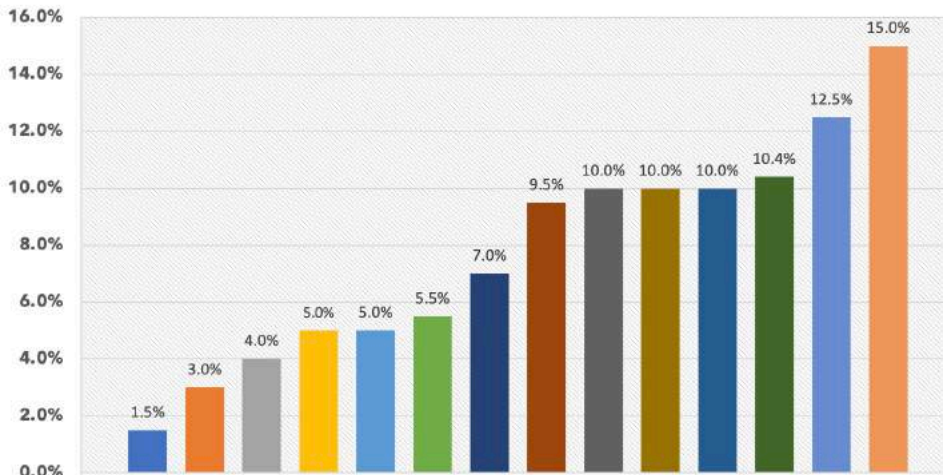
- Use other GMs/etc. as mentors for this topic. Ask them questions and learn from them.
- Hire an executive compensation coach.
- Use a professional compensation consultant.
- Know what the competition is making.
- Make sure you are being compensated in a manner which is consistent with the cost of living in your area.
- Boards consisting of successful businesspeople respect GMs who do not make the negotiation process easy. There is no reason to accept the first offer they give you. You are there because you have done a great job and you should value the job you've done.
- Do not be afraid to re-negotiate.
- Negotiate to receive long-term care coverage.
- Ask past Club Presidents to confirm your value with the future Board.
- Emphasize how costly it would be to replace you and how unlikely they would be to succeed.
- Negotiate for your children's education.
- Know your value and be prepared to walk away.
- Continue to go through the interview process even if you are not looking to leave as you need the practice for potential opportunities in the future.
- You can tell your Board you are interviewing at other Clubs, and you should be if you are not being fairly compensated.
- Look at job listings that list salaries and use that to encourage the Board to ask a headhunter how much your job is worth. How much would it be to find a replacement?
- Be very strategic about your compensation and your business for you and your family. Always have a business plan for yourself.
- Put yourself before the Club.
- "If you are going to get out of my way and let me run the Club then you don't have to pay me more, but if you're going to stay in my way, pay me double."
- Set yourself up with the Board as the "insurance policy" to retaining good employees.
- Share data about compensation with your Board.
- Benchmark your worth and have a solid, healthy severance package in place.
- Severance agreements are better than contracts.

- Allowing your agreement to automatically renew and including costly termination clauses can help protect your interests.
- Don't have your package/increases linked to those of the team.
- Ensure the Board is aware of the achievements and improvements you make every year.
- Negotiate benefits that are not a large cost for the Club but important to you: car, school for children, healthcare, gas allowance, etc.
- "You don't get what you don't ask for."
- Negotiate a percentage of operating profits.
- Receive rewards in a nontaxable manner (trips, car, etc.)

Total Compensation of Mastermind Attendees



Expected Compensation Percentage Increase Next Year



THE IMPORTANCE OF BUILDING, PROTECTING AND CHANGING YOUR CLUB'S BRAND

Examples of Brands:

- **Wimbledon** has two brands, the Club and the Championship. The Club began with a focus on croquet originally, playing on beautiful grass courts, expanding to tennis and now pickleball. We are holding on to our all-white aesthetic because it makes us who we are even though it causes issues with suppliers.
- **The Caledonian Club** was men only until 2010. The shift was not overtly advertised, but they make sure that women are represented in their social media. It is hard to change the perception of a London Gentleman's Club.
- **Real Club Valderrama** – Javier Reviriego said, "There is a fine line between being private and exclusive and working on your brand. In the past, it was seen as not exclusive and private to have a strong brand. When I arrived at the Club there was no social media. We made a decision that we had to control what our brand was communicating to the world. We decided the best way to keep the brand and keep awareness was to continue to have a golf tournament. You have to make sure that you control what people think you are.

RECOMMENDATIONS:

- Write the eulogy of your Club: What would it say? What does the front page of your current publication/journal say?
- Hire an outside branding agency.
- Developing a brand asset sheet that includes logos and other visual elements can help create a stronger, more cohesive brand that resonates with your audience. Including the brand spreadsheet makes a big difference.
- Develop brand guidelines and have staff police them and enforce compliance.
- Make all logos, colors, and fonts consistent.
- Utilize a five-year strategy document with values and then apply them to all collateral.
- Stay ahead and be professional with everything you do. The bar is constantly being raised by all of us. The only way you can do that is through your brand, not your Members. Keep it professional. Make sure the outward perception of your Club is strong.
- You must continue to evolve while staying consistent to your Club's core values.
- Putting new Members and legacy Members together in a melting pot is a real skill and is required to protect your brand.

- It's vital to prioritize risk management when you have a brand, as protecting your brand is more valuable than all your assets combined.
- The core values and vision of your Club are a major draw for Members. Make it a home away from home.
- Make sure you grow your own brand as well as the Club's.
- Being private and exclusive does not mean you should not work on your brand. Brands are essential for linking certain values to your Club. It provides awareness and will help in maintaining interest from future Members.
- The perception of a brand can easily be influenced by small details, so it is important to ensure consistency and pay attention to every detail to maintain a positive image.
- If you don't have one, create a branding guide for every aspect of your Club's communications to include approved colors, logos, and fonts and even wording (how do you write dates mm/dd/yy or m/d/yy and times, etc.) Make sure each item in your branding guide points back to the goals and mission of your Club. The Club's Strategic Plan should include a review of the branding guide periodically to ensure that you are relevant.
- Educate your team so everyone knows and understands it and can effectively articulate its essence.
- Perceptions are changed through communication and having a plan.
- Brand is more than a logo; it involves how you are perceived through your core values, mission, and vision. The way you operate is your brand.
- Modernize your logo if it is outdated.
- Have a crisis communication team identified before a crisis happens. Be ahead of any negative press or news stories. Hire branding professionals if you do not have the expertise in-house.
- Stay loyal to your brand. "It takes years to build but only mere seconds to ruin it."

MEMBER EXPERIENCE

How has the Member experience changed and evolved over the past five years? What are the new demands, and how do you balance the expectations of the senior Members and the current generation?

TODAY'S REALITY:

- There is a clash on rules, regulations, and dress code. It is very difficult to come to a consensus.

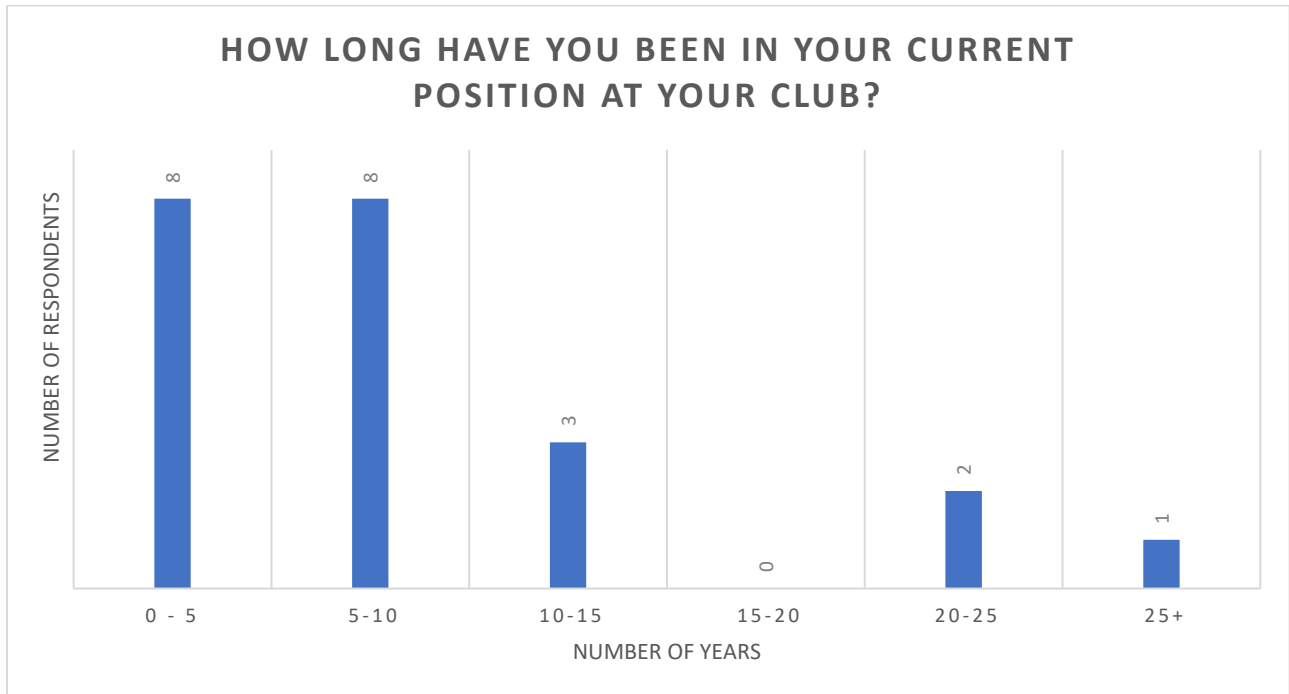
- Norms are being tested. An example: A Club hosts a Members' barbeque in the summer with about 500 people. One woman was adamant that children should not be allowed past 8:00 pm. However, they have 300 new Members, and they all have kids. So, as a compromise, we will allow kids past 8:00 pm but have a separate area for them to be entertained.
- People all want something special and different and want to be recognized.
- New Members require more wellness facilities and healthy food.
- Rules have relaxed in relation to dress code and cell phone usage.
- It's almost impossible to balance expectations of senior and junior Members. They have completely different views on what a Club should be.
- Successful Clubs will create innovative ways to engage their younger Members while striking a balance of appropriate traditions specific to the Club.
- Members look for more from their Club today and we must be able to deliver.
- Members want wellness services and for their Club to become a greater part of their lifestyle.

LOOKING FORWARD:

- Respect your history but get excited about your future.
- Develop programs suitable for all age groups to bridge the gap between young and legacy Members.
- People want to be comfortable and are willing to spend a lot of money for comfort food.
- Invest in a casual food and beverage experience but don't be afraid to charge for it.
- Change some areas to be more casual. For example: "Some come through in sports jerseys on their way to games. We can't turn Members away. The Club has to be available to everyone and everyone should be comfortable there."
- "We changed the dress code to allow jeans, but you have to wear a jacket if you wear jeans. Although, I have not found a way to get my managers to manage it correctly."
- Consider adapting to what's going on around your city. Example: A Club signed a deal with a 15,000-seat arena next to the Club for a box at the arena. "We have to make ourselves available to people who are dressing like they are going to a concert or ball game."
- Assign a staff member to deeply understand a Member. (Like "whales" at a casino) They will be that Member's host, they will make their dinner reservations, golf reservations, and know their favorite wine, etc. The wallet spend can increase 4x.
- Implement IT applications for bookings.
- Create experiences unique to your city or area.

- Do things that Members will remember forever.
- Cell phone policy is becoming more relaxed across the board. Most Clubs allow texting and checking emails but no talking on the phone in most areas.
- Repurpose rooms to enhance the Member experience with new amenities.
- Facilities/activities you might add in the next five years:
 - Wellness facilities
 - Longevity services
 - Spirits Lounge
 - Group travel
 - Ladies' locker rooms
 - Concierge doctor
 - Performance therapies
 - Cigar bar
 - Business center of the next decade
 - Coworking facility
 - A gala that is the kind of party anyone would want to go to
 - Hire 10 masseuses to give foot massages at the end of the night
 - Temperature controlled wine rooms
 - Celebrity chef dinners
 - Lectures that meet the interest of all ages
 - Club app for all bookings and Club information
 - Dual dining spaces with the same menu: one darker and louder with music or televisions, the other space can be brighter and quieter.

TENURE



PRIORITIZING AND DEVELOPING CREATIVE FUNDING OPTIONS FOR CAPITAL PROJECTS, CASH FLOW, DEPT, MEMBER ASSESSMENTS AND BEYOND

IDEAS:

- Rent space to Olympic teams.
- Increase debt and borrow money.
- Voluntary contribution programs.
- Increase transfer fees and decrease equity.
- Increase initiation fees.
- Send out a voluntary assessment and ask for the money.
- Develop a 10-year plan that outlines the required funding and present a comprehensive strategy to secure the necessary funding.
- Rent to film studios.

- Ask selected Members to fund specific projects.
- Add capital dues to the regular dues.
- Implement a life Membership program: You must be 50+ years old, a Member for 10+ years, and then the fee is 7 times the yearly amount and put into savings.
- Offer a lifetime golf Membership.
- Legacy life Membership for children and grandchildren (65% will not end up living in Philadelphia where they are doing this) Price: \$100,000.
- Life Membership that is 13 times annual dues; transferable to a blood child.
- Separate operating dues and capital dues.
- Funding can create camaraderie between Members.
- Subsidize capital expenditures with entry fees; give them an opportunity to make contributions.
- Encourage including the Club in estate planning.
- Don't be afraid of debt.
- Utilize cash flow, debt, life Memberships, and voluntary contributions.
- Allow Members to donate and auction items.
- Let Members donate airline miles.
- Accept Member bonds for capital projects.
- Use peer pressure to fund projects.
- Create a funding competition (name renovated rooms after the group that raises the most money).
- Sell the naming rights to projects.
- Register your Club as an historic landmark, if applicable, and make the exterior a nonprofit corporation to enable Members to make tax-free donations.
- Utilize debentures.
- Sell seats at a traditional Club event for five years.
- Keep a separate account for capital expenditures.
- Place entrance fees and 80% of surplus into a property reserve.

MANAGEMENT'S AUTHORITY AND METHODS TO ADDRESS MEMBER AND STAFF INFRACTIONS

- Create a culture in your Club of zero tolerance of infractions that staff and Members understand.
- Establish a Protocol Committee to include a council with female and male constituents. They provide an audience for hearings and work with the Club's attorney to provide guidance and determine the outcome. The Club's secretary writes the letter to the Membership, and the GM details the infraction.

- Have a set plan in place before it happens. Ensure your standards Committee is informed about any issues.
- Amend your document to set forth a formal process.
- Manage any harassment/bullying ASAP to ensure that if you are on the front page of the newspaper, you can say you managed the situation seriously.
- Create an environment where your team knows where their manager stands, and that the manager is against inappropriate actions of any nature. This makes staff more open to reporting infractions and less likely to commit them.
- Bylaws must clearly define the process to suspend or expel a Member from the Club.
- Utilize a strong lawyer who specializes in Club law. Review the Bylaws to ensure they are legally enforceable.
- Ensure rules and Bylaws are up-to-date and fit for purpose. Follow a process and seek external legal advice if deemed appropriate.
- Send a warning letter notifying the Member that they are officially warned, and there will be no second letter.
- Use other Members' influence to manage issues.
- Consider hiring a mediator who specializes in resolving critical and high-priority issues.
- Create decision trees for infractions to ensure consistency when dealing with and solving problems. If you are not consistent, it opens the door to challenges.
- Proper documentation is essential.
- Know what rights Members have.
- Be very careful with data and Governance as what you write up in a CRM can be shared with the relevant Member.
- Ensure your rules and Bylaws are as clear and concise as possible and seek professional advice from the outset to ensure their effectiveness and accuracy.
- Always be consistent with decision-making.
- Be careful what you put in writing unless to a lawyer as all emails are subject to discovery in litigation.
- Have any letters sent by the Board so the Member cannot go back against the GM.
- Know your limitations for "keeping it in the family" at the Club.
- Change the name of the Discipline Committee to the Standards Committee.
- Make sure all infractions are created equally.
- For Spanish Clubs: "My best advice would be to suspend Members no longer than 90 days as it's what it takes to hold a court hearing, which with Spanish law will end up enforcing Club to readmit."
- Reputational risk is more significant than not taking issues seriously.
- There have been legal challenges on expulsions.

- Members do not want to be embarrassed in front of their peers, they often do not want to go through with legal action because it will become public record if they sue their own Club.
- Unfortunately, the Members have the right to sue the Club even though it is against their best interest to sue their Club, and they will only lose.
- **Examples from the group:**
 - There was a Member taking photos in the ladies' locker rooms; they got caught and were expelled immediately.
 - We have zero tolerance for Members who hit on female staff, they will be suspended up to a year.
 - There was a fight in the cafeteria between two drunk Members, one was throwing bottles from the bar. One was suspended two years, the other for four years. The first man took the Club to court over the two years of dues he was charged.
 - We had a croquet teacher who had a fight with a Member, he was banned for life.
- How do you deal with secondary Members and spouses? How can you punish someone who is not a Member?
 - Use the same process as with the Member, and the Member is subject to the discipline.
 - The punishment can also be levied on the Member.
 - The Member is responsible.
 - Cancel the membership of the Member if they had a warning first.

ARE THE WORLD'S BEST CLUBS COMMITTED TO SUSTAINABILITY, AND WHAT DOES A COMMITMENT TO SUSTAINABILITY MEAN?

HOW DO YOU THINK ABOUT SUSTAINABILITY AT YOUR CLUB?

- "In our case we are very committed, this is what we do: We have a sustainability and environmental department, we are audited each year and we produce an annual report of all the things we do. We obtain a prestigious certificate that we must renew each year."
- New Members and their companies want to know your sustainability policy when joining. Therefore, you must be able to prove that you have what you say you have.

- Some Clubs are tied to their building, making some sustainability approaches more difficult.
- “We have managed the regulatory low hanging fruit (light bulbs, recycling, towels, eliminated plastics). The next step is managing electricity in public spaces when not in use.”
- “We are totally committed and working towards an environment positive for 2030.”
- “We are fully committed to get our Club to be the most sustainable it can be, by removing plastic, encouraging the use of reusable bottles for water. We have installed photovoltaic panels that produce 75% of the energy consumption of our Club house.”
- “We have concerns with the regulations imposed by EU where they are restricting the use of chemicals on the golf course.”
- Most Clubs are taking positive actions to reduce water consumption and the use of chemicals. However, some attendees felt the impact of these measures on the environment is probably lower than we tend to believe.
- There is division among stakeholders regarding the effectiveness of many sustainability initiatives.
- Sustainability nowadays is seen more as a multidisciplinary task than an energy issue.
- In the UK and Europe, it is regulatory. In Europe, everyone is committed to sustainability either due to their policies or government regulations.
- “In my environment, this is not something that can be done easily as the infrastructure does not exist.”
- US Clubs do not have the same requirements as European Clubs.
- Regulatory measures for the use of chemicals are getting more and more difficult for golf courses in Europe. As an industry, Golf Clubs should commit to ensuring that water consumption is optimized as much as possible.
- “When India and China are manufacturing with no control, can we impact this issue? I do not think so, so I believe this is not a priority in the USA.”
- “It is challenging and, in some ways, counter intuitive to use electricity generated by coal plants in order to power electric vehicles.”
- “In the US we installed LED bulbs, use recycled paper products, but our Members want bottled water, Styrofoam cups and plastic straws. The issue is rarely discussed with staff or the Board.”
- Sustainability is not discussed with our Board and is not part of our 10-year Strategic Plan.

SUSTAINABLE SOLUTIONS:

- Use recycled water for golf courses.
- Horse droppings from Club horses can be used for golf fertilizer.

- In Europe, in 2030, all golf course chemicals will be banned.
 - Steam sterilization is new, used at Wimbledon once every three years, and it kills everything using heat.
- Collect runoff water to wash vehicles.
- Use reverse osmosis to get rainwater for golf courses.
- Charge for water.
- Give Members refillable cups and water bottles.
- Look into the cost of charging stations as a Member benefit. Regulations may dictate that 67% of all new car sales be electric. That would affect many decisions.
 - A problem will be managing efficient car charging and paying for charging. "How do we deal with a car on charge when the owner went to golf for four hours, but it only needed to charge for one hour?"
- Clubs that are renovating their kitchens are adding liquefiers to lower food waste.
- Invest in solar panels.
- Use all-natural fertilizers.
- Develop a program to document sustainability best practices.
- Increase your electric fleet.
- Add more plant-based and seasonal menus.
- Reuse food waste
- Utilize reusable cups at your Club.
- Reduce retail packaging.
- Biodiversity: add living walls, wildflower meadows, and double the number of trees.
- Hire a sustainability manager/officer.
- Get a GEO certification.
- Easy wins should be implemented and communicated. Sustainability can be a great marketing tool especially for this generation.
- 501c3 operations now qualify for tax rebates.
- Try to eliminate plastic at your Club.
- Get Members excited about upcoming changes.
- Understand what it is you are looking to achieve and have a step-by-step plan to achieve it.
- An alternative approach is to lobby (US) government to continue to allow chemicals/fertilizer.

HELPFUL LINKS:

- Aqua Libra Co Water
 - <https://aqualibra.com/>

KEEPING UP WITH RAPIDLY CHANGING TECHNOLOGY, AND RESPONSIBLE CYBERSECURITY MEASURES

TODAY'S REALITY:

- Rapid change is coming in the next ten years.
- Implement what drives your business forward and not “nice to haves.”
- “Whatever you are spending now, you need to spend five times as much, think of it as a major building project or renovation.”
- Buy robust cybersecurity insurance and engage in audits every six months.
- Cyberattacks are more likely to come from within.
- Do some serious research on AI and machine learning and educate yourself on what is coming. It will change many elements of life in the next ten years or earlier.
- “We hired one of the top cybersecurity companies in the country to conduct a full audit and develop a plan to protect ourselves from potential attacks.”
- “We have recently developed an app that allows Members to book all Club related services and access all kinds of Club related info. Pacesetter is the brand. We have also integrated our accounting system in the app so Members can review their statements and expenses.”
- Have an on-site professional who maintains a degree in technology.
- Hire young people for the IT department but make sure they don't hack the Club.
- If you are held to ransom, pay fast as the price keeps going up.
- Build an IT department.
- Watch for internal and external threats.
- All documents sent by email with personal data should need a password to be opened.
- Read about the subject, adopt evolving technologies, test and learn from them.
- Use experts to advise on your cybersecurity requirements and test your systems regularly.
- Enable 2-factor security.
- Train staff on safe email protocols.
- About half of the attendees are holding their Board meetings via Zoom. The minutes reflect that they are meeting virtually.

CALL ON EXTERNAL EXPERTS:

- Work with a third-party external IT provider.
- Hire the best cybersecurity you can find to ensure you are safe.
- Have an internal and external team protecting your information. Outside agencies tend to be more current than in-house managers.
- Work with a dedicated IT company to ensure your anti-virus and network are kept up-to-date. Work with your insurance company to ensure you have adequate coverage.
- Work with a reputable outside company to manage cybersecurity risk management.

INVESTIGATE ROBOTICS:

- Invest in delivery robots for dining and guest services.
- Look into robotic mowers – Segway is launching one.
- Utilize a Roomba vacuum for housekeeping in the future.

HELPFUL LINKS:

ChatGPT

- Useful for writing Club letters, etc. You can insert bullet points and receive a nicely written letter.
- The group tested it by asking AI to make a cybersecurity plan for a Club, and it wrote a whole program to address it.
- We then asked AI to write a letter for a cell phone infraction at a Club in London.
 - <https://openai.com/blog/chatgpt>

Epifini

- Epifini is an AI solution for Club leaders which helps them navigate strategic implementation and ensure operational success. It uses Artificial Intelligence to diagnose and assess all major risks Clubs face across leadership, people and operations.
 - <https://epifini.ai/>

Pacesetter Technology

- <https://pacesettertechnology.com/>
- Kymatio for phishing
 - <https://www.getapp.com/security-software/a/kymatio/>
- NorthStar
 - <https://northstar.app/>

- Power BI
 - <https://www.stitchdata.com/resources/7-reasons-power-bi/>
- Beekeeper for staff communication
 - <https://www.beekeeper.io/>
- The Lazarus Heist Podcast
 - “Investigators claim a secretive, elite North Korean hacking ring, nicknamed the Lazarus Group, is responsible for the theft of billions of dollars around the globe.”
 - <https://podcasts.apple.com/gb/podcast/the-lazarus-heist/id1561990291>
- SevenRooms for F&B reservations
 - <https://sevenrooms.com/en/>
- Resdiary for F&B reservations
 - <https://resdiary.com/>
- TheFork for F&B reservations
 - <https://apps.apple.com/us/app/the-fork-restaurant-bookings/id424850908>
- Jitjatjo
 - On-demand staffing. “Like Uber for banquet staff”
 - <https://www.jitjatjo.com/>
- Hawk-Eye
 - Line-calling technology for tennis
 - <https://www.topendsports.com/sport/tennis/hawkeye.htm>
- PlaySight
 - Line-calling
 - <https://my.playsight.com/#/>
- Husqvarna
 - Robotic mower
 - <https://www.husqvarna.com/>
- Jonas Club Software
 - https://jonasClub.com/Online_Applications/Mob_App
- Clubessential for web design
 - <https://www.Clubessential.com/>
- Whoosh
 - Tee times
 - <https://www.whoosh.io/>
- Golfmanager
 - <https://golfmanager.com/>
- Golfdirecto
 - <https://golfdirecto.com/>
- Golfspain
 - <https://www.golfspain.com/en/>

THE RELEVANCE OF HISTORY AND TRADITION IN PRIVATE CLUBS TODAY AND MEMORIALIZING AND CELEBRATING THE HISTORY OF YOUR CLUB

TODAY'S REALITY:

- Tradition is important, but in the last five years, experience has become the priority.
- History and tradition will always sell in the US.
- "You don't have to be a 10/10. A lot of us that manage prestigious old Clubs want everything to be perfect, but the consumer doesn't need that anymore. The next generation is seeing and using Clubs very differently. Offer multiple amenities. Become a regional lifestyle Club. Members join at 28 and go until 88. We want to capture a larger percentage of the Members' leisure time spending. Be their favorite restaurant, hotel, business meeting place, etc."
- As Members today, we have the responsibility to protect the history and tradition of the Club.
- We need to make traditions today that will become history in the future.
- Our obligation is to preserve the historical documents in the Club.
- Digitize your history and memorabilia.
- Young people respect history.
- History supports worldwide recognition of the Platinum Clubs® *Seven Selection Criteria*.
- Many Clubs have had fires and lost memorabilia – don't be the next – digitize now.
- Networking is very relevant in Clubs. When you walk in and you have an opportunity to engage with an audience of C-suite Members. You are bringing people with like interests together.
- Celebrate the past but invest in the future. Make certain that all employee orientations include the history of the Club. Attending family events such as funerals is important.
- Record the history of Membership and staff to use as a recruiting tool.
- Without your history, it is hard to make decisions for the future.
- Create commemorating books for Club milestones. Centennials, bicentennials, etc. This can be a great marketing tool.

- It is vital to keep your key purpose at the heart of everything you do (golf, sailing, tennis etc.) Then make it relevant to today's audience through technology or the celebration of traditions.
- Celebrate by publishing a book documenting the history of the Club.
- Take videos to capture the experiences of older Members or staff members.
- Books are best for history, and digital is best for the future.
- The history of a Club is very important but must be balanced with where the Club is and what the future will bring.
- History starts today and should be celebrated.
- Keeping the DNA of the Club is important but do not let it overly direct your future.
- Examples from the group:
 - **Vanessa Clifford, Royal Thames Yacht Club:** We have a Heritage Committee. Our 250-year anniversary is in two years, and we are marking it with a set of books and a painting and restoring flags. Celebrate the past but invest in the future. We are investing our time and money in the bigger picture and how to take the Club into the future to be around for another 250 years, trying not to dwell on it. We asked the Heritage Committee to write a bi-weekly article, it is by far the most read article in our newsletter.
 - **Ross Matheson, Wimbledon:** We have the biggest tennis library in the world, the largest collection of tennis racquets, a public tour business, 250-300 heads a day. The museum, library, and shop are key in holding the legacy of the Club. We invested in a Club historian, a full-time position for research and to be used as a resource for staff. We're moving the library and anything of value into a digital library, scanning and digitizing.
 - **John Blanch, Wentworth Club:** New Members are less interested in historical facts. If we shared every artifact we own, our whole Clubhouse would be a museum. We want it to be in a specific area, so it feels more important.

RECOMMENDATIONS:

- Clubs must implement working environments and become casual by design.
- Digitalize all historical documents.
- Create a Heritage Committee instead of a History Committee.
- Create a museum and purchase memorabilia and artifacts related to the Club.
- Integrate historical items into the interior design of your properties.
- Design your Club with the past in mind.
- Have a special history section on your website and historic photos around the Clubhouse and pro shop.

- Create events that are popular for young Members and long-standing Members. Wine dinners, chef dinners, current event speakers, Member/Member events, special interest groups.
- Educate new Members and staff about the Club's history.
- Celebrate the decades if you are a young Club. Members love events surrounding the Club's heritage.
- Educate your staff about the history of your Club so they can answer questions when Members ask, and they will feel a sense of pride.

HOW DO GENERAL MANAGERS AND CEOs CREATE A LASTING LEGACY AT THEIR CLUB?

PERSPECTIVES:

- "I have a unique, healthy thought about it. I've been at the Club 38 years. I think there will be 5 people that call me when I retire, I think that's life. People move on, but the legacy will be that the Club is healthy. You are setting yourself up for disappointment if you expect them to build a statue when you leave. My family is my main life."
- "I agree, they won't be missing you. On a personal level you have to feel good about what you did and feel relaxed that you did a good job. Someone else will come in and in a few months, you will be forgotten. This might change, but I don't think it should be one of our goals, this is a job. I don't feel sentimental about it."
- "The journey is important, maybe we could celebrate it a little more commercially. Being a family-owned business since 1921 we opted not to have a branded hotel or golf Club. People have the sense that our hotel has a family touch."

RECOMMENDATIONS:

- Ask: What did you accomplish during your tenure to improve the Club? How did you set the Club up for the future?
- Set a goal to ensure your team and Members are better off having known you.
- Strive to touch people's lives positively and have the staff remember you as the one who provided them this opportunity and meaningful work.
- Succession planning is not only for people but can be an organizational and values-based structure that endures.
- Be humble and do the best job you can do. You will be remembered for that.

- Build and develop capital projects that make a difference.
- Develop a management training program, cross-train leaders, and mentor the next generation.
- Take on capital projects and invest in something that will be there for years to come.

HELPFUL LINKS:

- The Power of Moments Book
 - This book encourages you to pick the mentor you had and write them a letter and thank them for what they did for you. A personal goal you can have is to do such a great job that you get that letter 20 years from today. “The best letter you will write this year is the one to the person who helped you 10-15 years ago.”
 - <https://heathbrothers.com/the-power-of-moments/>