A black and white logo

Description automatically generated

**BMI II Leadership Principles Learning Objectives**

**Women in Leadership Panel**

* Engage in an open, honest discussion about the challenges and opportunities surrounding women in leadership within the private club industry.
* Identify and explain key barriers—such as stereotypes, work-life balance challenges, and lack of opportunity—that inhibit the advancement of women in the private club industry.
* Reflect on your personal role (regardless of gender) in fostering a more inclusive leadership culture and propose at least one commitment you will take back to your club to support women in leadership.

**Club Trends**

1. Describe who the club is. JC is Private, Social, Rich History, Facility Rich
2. Describe who club services and events are designed for, what facilities are necessary, what resources are needed
3. Assess appropriateness and relevance of services and events to the club’s mission, membership profile, club culture
4. Discuss the intentional Integration of technology to enhance member services and events
5. Examine club’s competitive set (motivators, inspiration) outside the club world
6. Explain the purpose and benefits of intentional and directed community involvement for a private club

**Executive Presence**

1. Differentiate between the key pillars of executive presence and explain how they influence leadership effectiveness within private clubs.

2. Evaluate common personnel, governance, and member relations challenges in the club industry and propose practical strategies to address them.

3. Assess their own leadership behavior against best practices for trust-building, communication, and integrity.

4. Apply financial oversight principles to align operational budgeting with club mission and long-term goals.

5. Formulate a personalized approach to influence club culture, stakeholder perception, and staff engagement.

**Governance and Committee Orientation**

1. **Understand & Demonstrate** professionalism**,** by understating and defining all roles and having the confidence to execute as the paid professional
2. **Establish** trust, by **Understanding** the keys to open and honest **communication** in the Committee or Board room
3. **Define** boundaries, by **Determining** clear roles and orientating appropriately
4. **Prioritize & Evaluate,** those in your organization (including staff, members, Board, and Committees) to ensure all are empowered to **Collaborate** to **Produce** best results and foster a culture of excellence and empowerment
5. **Utilize** effective Tools to help advocate your initiatives by **Discussing** how to incorporate relevant data and communicating clear goals including development and implementation of Mission, Vision and Core Values, use of White Papers and presenting clearly to decision makers.

**Understanding Financials in a Private Club Environment**

**Key Learning Objectives:**

**Policies – guide behavior, fiduciary responsibility to think of Members, Staff, and Organization**

1. Analyze: Understanding your governing documents and what they are telling you
   * Remember: Identify the governing documents
   * Understand: Describe the roles and responsibilities of board, members, and staff
   * Analyze: Explain how those documents tie to financials
     + Remember: List the types of membership categories
     + Understand: Describe access rights for each category
   * Evaluate: Justify why membership categories and access levels are codified
   * Evaluate: Assess whether the documents align with mission, vision, and core values
   * Evaluate: Determine whether the Board or Members lead capital decisions
   * Analyze: Examine if existing provisions support the Club’s goals
     + Create/Evaluate: Propose modifications to preserve trust and competitiveness
   * Apply: Implement and review internal controls—Audit processes

**People – reputation, satisfaction, financial performance**

**Members – Talent - Only difference between the two one pays dollars the other receives**

1. Understand/Compare: Understanding different financial models
   * Remember/Understand: Describe various ownership structures (For-Profit, Non-Profit, Corporate, Sole Owner, Member Owned)
   * Analyze/Compare: Differentiate Experience-Centric (dues-focused) vs. Use-Centric (fee-focused) models
2. **Understand: Financial Storytelling** 
   * Understand: Measure key performance indicators (KPIs) for revenue
   * Understand: Compare high-flow versus low-flow revenue
   * Apply: Calculate cost of goods sold (COGS)
     + Dollars vs. Percentage – Which is more important?
   * Apply: Budget and control payroll expenses
   * Tool Talk: MIT Living Wage Data, and other comparable living costs (Breakout)

**Places**

1. **Understand/Evaluate:** Balance Sheet/Financial Health
   * Understand: Explain how reserves and capital drives long-term club health
   * Remember: Define and categorize assets
   * Understand: Describe depreciation methods
   * Analyze: Differentiate sources of income (Capital Dues, Assessments, Debt)
2. **Tool Talk:** Understand how to drive trust/change through data driven decisions
   * Whitepapers
   * Presentations
   * Budgets
   * Benchmarking

**Strategic Leadership (Planning)**

* Developing a working understanding of strategic planning and how to use strategy in private clubs.
* Emphasize strategic advantage.
* Focus the Board on strategy
* Articulate Strategic Success a Primary Part of Your Job.
* Establish Your Team of Its Role in Strategy.
* Prioritize Strategy to Members’ Wants and Needs.

**Learning objectives for BMI II case study & Leadership Perspective session(s):**

**Upon successful completion of the course, the manager should be able to:**

**Each day:**

1. Identify the problem(s) within a given scenario.
2. Apply the concepts provided in daily seminar to provide recommended solutions to the problem/issue identified.
3. Debate amongst group members the key issues and most effective solutions to the group-identified problems.
4. Prepare a summary of problems and recommended solutions for class presentation.
5. Present to the class the group’s ideas on problems and solution for the scenario provided.

**At the end of the week:**

1. Select three to five overarching/critical issues facing the fictitious club proposed in the case.
2. Synthesize solutions to the integrating key course concepts provided throughout the week.
3. Compose a business memo outlining the key leadership issues and proposed solutions facing the fictitious club provided in the case study.

**Technology & Clubs Session**

Upon Completion of the presentation, the manager should be able to

* Utilize key guiding principles when making an investment in technology.
* Understand the benefits of analyzing their existing systems, in an effort to determine whether it meets their existing needs.
* Understand how technology impacts each department within the club.
* Realize the benefits of implementing revenue generation-based applications.
* Analyze horizon products/applications and how determine how they can apply within club industry.

**Lumina Leader**

* Lumina Leader makes you aware of what **leadership strategies** you are **choosing often**.
* Lumina Leader makes you aware of what **leadership strategies** you are **avoiding or omitting** in your Leadership style.
* Lumina Leader makes you aware of **how you see yourself** as a leader.
* Lumina Leader makes you aware of what happens to your Leadership style when you are overextended (**stressed**).
* **WHAT** you are **choosing** to do as a leader and the leadership choices you are making often.
* **HOW** these current leadership competencies can be further enhanced using your personal strengths.
* **OVEREXTENDED** behaviours and how these impact your leadership choices, personal and professional relationships and how to mitigate this.

**Club Ethics**

At the end of this session, you’ll be able to:

* Discuss the importance of ethics in making good decisions *quickly* and *consistently,*
* Appreciate the complexity of ethical decision making--- The Ethical Gray Zone.
* Use ethical principles *to explain* the decisions made---clearly and effectively.
* *Identify ethical dilemmas* that can and most probably will arise in your personal and professional life.
* Use The Club Manager’s Code of Ethics as a *tool for resolving ethical dilemmas* in your professional life.