



**Private Club
Performance Management**

Employee Development and Discipline on the Go



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Topical Index

- 01 Human Assets
- 02 Steps to Lower Employee Turnover
- 03 Why the Wrong People Are Hired
- 04 The Damage Done by the Wrong People
- 05 Hiring Responsibility and Due Diligence
- 06 Departmental Staffing Guides
- 07 Exempt and Non-Exempt Positions
- 08 Employment Law and Rights
- 09 Disciplined Hiring
- 10 Prohibited Interview Questions
- 11 Reference Checking
- 12 Screen for Success
- 13 New Hire Onboarding
- 14 Employee Handbook
- 15 Work Policies
- 16 New Hire Orientations
- 17 Employee Development
- 18 Job Descriptions
- 19 Staff Notes
- 20 Performance Reviews
- 21 Performance Review Principles
- 22 Conducting Meaningful Reviews
- 23 Training**
- 24 Types of Training**
- 25 Etiquette Training**
- 26 Training Requirements and Principles**
- 27 Initial and Ongoing Training**
- 28 Training Curriculum by Position**
- 29 Training on the Go**
- 30 Terminations
- 31 Principles of Disciplinary System – 1
- 32 Principles of Disciplinary System – 2
- 33 Common Disciplinary Problems – Tardiness, Absenteeism, Notification
- 34 Common Disciplinary Problems – Misconduct
- 35 Common Disciplinary Problems – Unsatisfactory Performance
- 36 Common Disciplinary Problems – Misuse of Sick Days
- 37 Common Disciplinary Problems – Bad Attitude
- 38 Conducting Counseling / Disciplinary Sessions – 1
- 39 Conducting Counseling / Disciplinary Sessions – 2
- 40 So, They Improve, Now What?
- 41 Discharges
- 42 How To Discharge
- 43 Unemployment Compensation
- 44 Leadership**
- 45 Good Leadership – It’s Just Common Sense**
- 46 Service-Based Leadership**
- 47 Becoming a Service-Based Leader**
- 48 The Soft Stuff**
- 49 Relationships and Leadership**
- 50 Our Need to Serve**
- 51 The Hierarchy of Service**
- 52 Morale Matters**
- 53 Leadership and a Failure of Engagement**
- 54 Value Your People – 1**
- 55 Value Your People – 2**
- 56 Give Them More Than Just a Paycheck**
- 57 The 100/0 Principle**
- 58 Your Example**
- 59 Record of Employee Counseling, FM-103
- 60 Applicant Reference Check, FM-108
- 61 Employee Development Plan, FM-116
- 62 Employee Separation Document, FM-117
- 63 Employee Handbook Acknowledgement, FM-118
- 64 Employee / Departmental Goals, FM-135
- 65 Action Planning Sheet, FM-136
- 66 Additional Resources



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Management**

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Introduction

Private club operations face a challenging training burden if they are to deliver the high levels of service expected by their members. Yet with tight budgets how can managers meet their training obligations while controlling costs since every hour of training is a payroll hour for each employee being trained? Add to this the difficulty of getting all your employees together at one time for formal, consistently-presented training sessions.

The answer to these challenges is to build your training programs around the “on the go” concept where ongoing training materials are formatted in brief – no more than five to ten minute – modules. In every shift, in every department, there are spare moments, time when employees have finished their shift preparations, time when employees are socializing among themselves or awaiting instructions from supervisors. Since you’re already paying for this time, plan on putting it to good use.

There is probably no more important training than ensuring that managers and supervisors have a firm grounding in labor laws and employee development and discipline best practices. This can only be done by exposure to and constant reminder of the underlying principles and best practices by which the club conducts itself in relation to developing its employees.

Private Club Performance Management has developed a large number of [Personnel Standards, Policies, and Procedures](#) and [related forms](#) to formalize and document its HR processes.



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Tips for Use

One of the major motivations in creating the Employee Development and Discipline on the Go material is to provide managers with the disciplines and skills to get the most out of their human assets.

The Employee Development and Discipline on the Go material is prepared in MS Power Point files and presented in pdf format. Each topic is numbered, beginning at #01.

For best results, after printing each topic on paper or card stock, the sheets should be laminated. It may be cheaper and more convenient to invest in a laminating machine and doing this yourself, rather than paying someone else to do this. Another option would be to place sheets into clear document protectors. After printing and protecting each sheet, it should be filed in a filing cabinet, file box, or three-ringed binder in numerical sequence. By using the provided index, you can easily locate a particular topic.

It is also suggested that the entire series of topics be printed, spiral bound, and added to the club's professional development library. In this way, the book can be used to bring newly hired managers and supervisors up to speed on requirements and expectations for those who lead and direct the club's employees.

The Employee Development and Discipline on the Go material can be used in group-led discussions for ongoing training of managers to reinforce key issues or they can be used by an individual who wants to work through the entire program in sequence to upgrade skills and knowledge.

As with any other tool, Employee Development and Discipline on the Go is only as effective as the effort put into it by the supervisor and/or employee. Each sheet provides the "take away" from the lesson. Comprehension can be improved by asking employees to explain terms or points in their own words, offer examples from their own experience, or illustrate points with real or imagined scenarios. The key is to get them to think deeply about each topic and connect it with their own experience and the context of their job.



#01

Human Assets

One of the most important factors in the success of any endeavor is the dedication and performance of its employees. They are, after all, the ones who do the work from top to bottom of the organization and they are the ones who directly serve your members every day in all areas of the club.

Recognizing the importance of employees' contributions, there are a number of things that influence the quality and performance of your human assets.

- Hiring well,
- Employee development and training,
- Disciplinary system, and
- Organizational leadership.

Hiring Well. Jim Collins in his groundbreaking book, *Good to Great: Why Some Companies Make the Leap . . . and Others Don't*, speaks of the importance of getting the right people on the bus and the right people in the right seats on the bus. The first section of Employee Development and Discipline on the Go (EDDOG #s 2-16) addresses the necessary disciplines to do this.

Employee Development and Training. In order for employees to perform at high levels they must know what's expected of them, be thoroughly trained, and receive ongoing feedback, both formal and informal, regarding their performance. EDDOG #s 17-29 address these requirements.

Disciplinary System. It's an absolute requirement that employees are treated consistently and fairly in all aspects of employment and the club's disciplinary system. The consequences of failing to do this include discrimination and wrongful termination complaints, higher unemployment compensation costs, and the ongoing turmoil of complaints and grievances. EDDOG #s 30-43 address these issues.

Organizational Leadership. This is the most important factor contributing to high levels of employee commitment, dedication, and performance. Employees who are valued, engaged, motivated, informed, listened to, and empowered by the consistent application of sound leadership from the entire management team will consistently achieve at higher levels than those who don't. EDDOG #s 44-58 touches on these concerns.

Lastly, Employee Development and Discipline on the Go includes a variety of forms (EDDOG #s 59-65) that are used in the administrative side of employee development and discipline.

While much of Employee Development and Discipline on the Go touches on typical Human Resource concerns, the emphasis of this material is an understanding by management of the factors that foster employee teams committed to the mission and goals of the club.

Take Away: While high performing individuals can be found in any segment of the population, a club will find it difficult to build a team of such performers without understanding the underlying disciplines in finding, hiring, developing, retaining, and properly leading them.



#02

Steps to Lower Employee Turnover

Study after study has demonstrated the high cost of employee turnover, particularly in the hospitality industry where the work is so detail-intensive, requiring significant training to meet standards.

Recognizing that the desired outcome of every hiring decision is to find and bring aboard a qualified and enthusiastic person who will make a positive contribution to the success of the club, it is essential for all managers to make efforts to lower employee turnover rates. Here are six steps to help do just that:

- **Hire Well.** Use the techniques of Disciplined Hiring to screen applicants and check references. When possible, use personality profiles to ensure you put the right person in “the right seat on the bus.”
- **Onboard Well.** Use all the club’s tools to both welcome and orient new hires to the workplace. The Employee Handbook, as well as the club and departmental orientations, are designed to provide and reinforce important information to the new hire. Managers must make sure that orientations are welcoming and make all necessary introductions to both supervisors and peers.
- **Train Well.** Both initial and ongoing training is essential. Most people want to do a good job and appreciate the efforts made to train them. Without adequate training and the necessary tools and resources to do their jobs well, new hires will quickly become cynical and alienated. Never forget that their success guarantees your success.
- **Organize Well.** No one wants to work in a chaotic environment. If your department or section is well-organized, if everyone knows where things are, if employees are well-trained in opening and closing procedures, if everyone knows their responsibilities and is held accountable, the workplace runs almost effortlessly. Don’t run off good people by putting them through the hell of a disorganized operation.
- **Communicate Well.** Daily interaction and direction ensures that everyone is informed, knows what is going on, and what they must do individually to accomplish the tasks at hand. It is also instrumental in building teamwork and a sense of shared values and mission. Some form of pre-shift meeting or *Daily Huddle* is a necessary discipline to ensure ongoing, consistent communication.
- **Value Them Well.** Remember the ultimate value of people in all you do. Value your employees and they will value you as a leader and their efforts at work.

Take Away: Your leadership is the essential element in your success. If you have high levels of turnover, there is no one to blame but yourself.



#03

Why the Wrong People are Hired

Dr. Bradford Smart, in his book *Topgrading*, says that 50% of all hires are mis-hires. This dismal success rate is no better than flipping a coin. Since the quality of any operation is directly dependent upon the quality of its staff, clubs must make an effort to hire well – not only managers and supervisors, but also front-line staff.

While there is no fail-safe method of hiring only the right people, there are common denominators underlying most mis-hires. They include:

- The failure of hiring managers to use “due diligence” in hiring applicants.
- Lack of supervisor’s screening, interviewing, and reference-checking skills.
- Hiring managers not taking full responsibility for the hiring process by assigning or delegating the responsibility of hiring to another person who may not understand the needs of the position or who has no vested interest in a successful hiring outcome.
- Hiring a “warm body” to fill a position.
- Failure to learn from past hiring mistakes.

When club management recognizes why the wrong people are so often hired, they are in a position to do something about it.

- First and foremost, train managers in proper screening, interviewing, and reference-checking techniques.
- Next, use various tools to help in the hiring process, such as interviewing and reference-checking forms.
- Lastly, establish and maintain a discipline of using the techniques and tools of Disciplined Hiring in all hiring situations.

Take Away: Hiring well pays great dividends in all areas of club management and operation and warrants the use of Disciplined Hiring tools and techniques.



#04

The Damage Done by Hiring the Wrong People

Dr. Smart lists the many downsides of hiring and retaining the wrong people, whom he calls C-Players, as managers or supervisors. He says they:

- “Embrace tradition over forward thinking.
- Have difficulty coping with new and complex situations.
- Prefer the status quo.
- Lack credibility, so others are hesitant to follow them.
- Require specific direction [from superiors].
- Hire mostly C-Players [A- and B-Players are viewed as threats].
- Tolerate mediocrity.
- Drain energy from others; their [inaction or] actions prevent synergy.
- Sporadically meet expectations.
- Bend the rules.
- Have mediocre skills [and seldom seek self-improvement].”

Hiring and retaining low performing managers or supervisors can have a long-term ripple effect in an organization. On the other hand, hiring A-Players for those critical leadership positions in a club can have long term positive effects.

If hiring the right people is critical in hiring the managers and supervisors of the club, it is also important, though for different reasons, in hiring line employees – those that interface directly with members. The dangers in hiring the wrong people in member-interface positions include:

- The damage they can do to member service.
- The turmoil they create in your work team while they are with you.
- The amount of time that you must spend in training and retraining them.
- The amount of time that you must spend in counseling, disciplining, and ultimately terminating them.
- The lost opportunity of using your limited time and resources to work with them – time that could be better spent on other initiatives and pressing issues.
- The cost of replacing a substandard employee – both in terms of hiring and training a replacement.
- And the emotional wear and tear on everyone involved.

Take Away: Hiring poorly damages the club in a variety of ways, but ultimately the results show up on the bottom line for a host of reasons.



#05

Hiring Responsibility and Due Diligence

There is only one person responsible for hiring the right people and that is the manager or supervisor of the person being hired. Hiring manager or supervisor are the one who are accountable for their departments or sections' performance and, therefore, are the only ones who should make the hiring decision. While every leader will occasionally mis-hire, those supervisors who consistently hire the wrong people should be held accountable.

Do not for one moment think that hiring is the responsibility of a human resource manager. He or she may assist in the process, but the assistance is no more than consultative or clerical. If any person hired turns out to be a bust, the only person responsible and accountable is the hiring manager, and he or she must bear the consequences of mis-hiring.

Given the responsibility managers have to hire the right people and to avoid hiring the wrong people, they need to exercise "due diligence" throughout the hiring process.

Due diligence is a financial/accounting term that means to investigate a potential investment and/or confirm all material facts regarding a sale. Generally, due diligence refers to the care a reasonable person should take before entering into an agreement or a transaction with another party and is essentially a way of preventing unnecessary harm to either party involved in a transaction.

While the term "due diligence" has come to take on the wider meaning of doing one's homework to prevent mistakes, clearly the original definition applies to hiring employees, that is making an offer of employment to another party.

The failure of hiring managers to use "due diligence" includes:

- Failing to analyze and identify the requirements of a vacant position.
- Failure to carefully screen applicants to ensure that their experience, skill set, and personality are appropriate for the vacant position.
- Failure to conduct adequate interviews, particularly face-to-face, with applicants.
- Failure to carefully check references.

Take Away: Hiring managers must take full responsibility for the outcome of each new hire and use the discipline of due diligence in screening applicants for hiring.



#06

Departmental Staffing Guides

Clubs will typically create well-defined employment categories for employees to make benefit determinations based on the number of hours worked. As an example, one club created the following definitions:

- *Full time – employees who work not less than 35 hours per week on a continuous basis and employment is anticipated to last 11 months or more.*
- *Part time – employees who work less than 35 hours per week on a continuous basis and employment is anticipated to last 11 months or more.*
- *Seasonal – employees whose employment is expected to last less than 11 months regardless of the number of hours worked per week.*

In this instance, full time positions were eligible for full benefits, the part time staff received more limited benefits, and the seasonal positions received no benefits.

Given the seasonality of most club operations, clubs have a need to expand and shrink their labor force to meet the needs of each seasonal business level. The ability to do this in a timely manner will save the club significant amounts of unnecessary cost. Further, most club managers recognize the benefits to member service and organizational continuity of having a stable work force. Lastly, clubs should avoid full time staff layoffs as much as possible for both the cost and morale impact they create. The challenge then is to balance the need for a stable staff with the cost-saving ability to shed excess positions when business levels warrant.

The solution to these competing needs is to establish staffing guides for each department made up “core” and seasonal positions. The core positions represent those staffing needs for year-round minimum function and service needs and can be either full or part time depending upon the needs of both the club and employees. Seasonal positions are just that – those that are added and reduced as business demand warrants.

Each department head, by creating a staffing guide of core and seasonal positions, determines optimal year-round staffing. These core positions, then, are “protected” from seasonal adjustments in all but extreme situations. Once the staffing guides are determined for each department, no new hires should be made for core positions without an existing vacancy or the express approval of the general manager.

Take Away: Staffing guides are a discipline to ensure that year-round staffing levels are established to protect core requirements while controlling seasonal pay costs.



#07

Exempt and Non-Exempt Positions

There are a lot of misconceptions regarding the paying of employees either as salaried (a fixed amount each pay period) or hourly (an amount based on the number of hours worked times an hourly rate of pay). Some managers seem to think that you can avoid overtime payments by paying the employee a salary. But nothing could be further from the truth and such a practice could put a club in violation of the federal Fair Labor Standards Act (FLSA) which specifies a number of wage and hour requirements for employers.

The FLSA mandates that employees who work more than 40 hours in a workweek be paid overtime – that is time and one half for each hour worked over 40. Exemptions are made to this requirement for certain managerial, professional, and commission-compensated positions – thus the term “exempt” employees.

But the requirements for these exemptions are few, defined, and have been narrowly interpreted in court cases. All other employees are considered “non-exempt” and must be paid overtime as required by the FLSA.

It is dangerous, then, for any club not to assess and classify each position as either exempt or non-exempt depending on a careful evaluation of job functions to meet the exemption requirements. Even after positions are classified, the club must be vigilant that new positions are not designated as exempt without a formal review of duties and responsibilities and that job requirements of existing exempt positions do not materially change, thereby affecting their exempt status.

Failure to carefully adhere to exemption criteria can be costly for clubs in terms of fines, penalties, and orders for payment of back overtime work.

Clubs may pay a non-exempt position on a salaried basis but are still liable for overtime payments for hours worked over 40 in a week. Thus, paying non-exempt positions a salary requires ongoing vigilance to ensure overtime compensation is paid correctly.

Take Away: No position should be made salaried to avoid overtime payments without a careful review of job requirements and exemption criteria.



Employee Law and Rights

Employment at will. Many states are Right to Work states meaning that during the course of an individual's employment, he or she is free to leave at any time for any reason and the club has a similar right to terminate the employment relationship, at any time, with or without cause or advance notice.

Equal opportunity. Federal law requires a club to be an equal opportunity employer and prohibits discrimination on the basis of race, color, religion, age, gender, national origin, or veteran status. This requirement covers all aspects of employment, including hiring, training, promotion, job assignments, compensation, discipline, discharge, and application of all of club policies, procedures, and benefits.

Legal status to work. The Immigration Reform and Control Act of 1986 makes it illegal to hire persons not authorized to work in the United States. This act also requires prospective employees to present documents proving their identity and authorization to work.

Youth employment. Federal and state work rules regarding youth employment restrict those individuals under age 18 from working in certain hazardous professions or with specific equipment and machinery, as well as the time of day and hours worked.

Overtime requirements. The Fair Labor Standards Act (FLSA) classifies employees as either Exempt or Non-Exempt based upon their eligibility for overtime payment. Any non-exempt employee who works more than 40 hours in a workweek is entitled to be paid time and one half for each hour worked over 40.

Harassment. Employers must maintain a pleasant and productive work environment for all their employees. All forms of harassment, sexual or otherwise, are prohibited.

Family Medical Leave Act (FMLA). Businesses of a certain size are required to provide eligible employees with up to 12 workweeks of unpaid family and medical leave for certain family and medical reasons during a 12-month period. During this leave, an eligible employee is entitled to continued group health coverage on a self-funded basis. At the conclusion of the leave, subject to some exceptions, an employee generally has a right to return to the same or an equivalent position.

Americans with Disabilities Act. The Americans with Disabilities Act (ADA) provides individuals with disabilities civil rights protections similar to those provided to individuals of other protected groups. The Act guarantees equal opportunity for individuals with disabilities in public accommodations, employment, transportation, state and local government services, and telecommunications. A bona fide private membership club that is exempt from taxation under section 501(c) of title 26 is exempt from the employment requirements.

Military Leaves of Absence. The Uniformed Services Employment and Reemployment Rights Act (USERRA) requires that a leave of absence be granted to an employee in order to meet service requirements in the uniformed services of the United States. At the conclusion of the leave, subject to some exceptions, an employee generally has a right to return to the same or an equivalent position.

Workers' Compensation. All employees are protected by Workers' Compensation should any accident happen while they are performing their jobs. Clubs carry this insurance to protect employees and bear the full expense for this program less any deductibles that may apply.

Unemployment Insurance. Club pay the entire premium for unemployment insurance to protect employees who may be laid off from work through no fault of their own.



Disciplined Hiring

Hiring well is an important discipline in any successful business. Jim Collins, in his groundbreaking book *Good to Great: Why Some Companies Make the Leap . . . and Others Don't*, said “getting the right people on the bus” was an essential discipline of great companies. Dr. Bradford Smart, author of *Topgrading*, said that in his experience 50% of all hires are mis-hires. This miserable success rate is no better than gambling by flipping a coin – and gambling is exactly what a club does every time it hires without the basic requirements of Disciplined Hiring. These include:

- **Interviewing Skills.** Dr. Smart recommends a “structured, chronological” interview where the interviewer reviews the candidate’s entire education and work history chronologically and in detail to understand the candidate’s personal and professional growth in the context of expanding responsibilities, accomplishments, lessons learned, and work skills and habits. While such a thorough process is excessive for line employees, it is an excellent discipline for hiring managers whose efforts have much greater impact on the club’s success.
- **Type of Interviews:**
 - Telephone interviews are screening interviews and are designed to reduce the hiring focus to a smaller number of qualified applicants. These interviews can be delegated by the hiring manager to properly trained subordinates or the human resources office so long as the interviewer has a clear understanding of the experience and skill set the hiring manager requires.
 - Face-to-Face interviews are more in-depth and are reserved for final candidates. These interviews must be conducted by the hiring manager to ensure she takes full responsibility for the hiring decision. Face-to-face interviews require careful preparation including reviewing candidate’s resume or application, developing a series of questions that focus on the necessary experience and skills for the position, and the determination to pursue an understanding of the candidate, particularly when responses to questions are vague or evasive. Ultimately, the hiring manager needs to understand who the candidate is, what his values are, how he approaches his work, that his work experiences are valid and germane, and that his personality fits the culture of the club and the necessities of the position.

In both types of interviews, thorough notes should be taken of questions asked and responses given. These are useful when reviewing the candidates after the interviews and in making the final decision.

Take Away: Hiring well requires discipline and commitment to ensure the right person is hired for each club position.



#10

Prohibited Hiring Questions

Managers must know what questions cannot be asked during interviews. Such questions are derived from federal law which prohibits employment discrimination based on protected groups. Certain direct questions of a job applicant on some topics are prohibited:

- Age – including questions that may reveal age, such as the year of high school graduation.
- Religion – you can and should state the working hours of the position, particularly if it includes weekend work and whether the applicant can work those hours with reasonable accommodation.
- Race and Gender
- National Origin/Citizenship – you may ask if the applicant is eligible to work legally in the U.S.
- Disabilities/Health History – you can enquire about the applicant’s ability to perform the essential functions of the job.
- Union Membership
- Languages Proficiency – unless a specific language skill is required for the job.
- Marital/Family Status – including questions about maiden name, pregnancy, children and childcare. You can ask job-related questions about hours/shifts applicants would and would not be available to work, as well as any other responsibilities that might interfere with specific job provisions, such as traveling.
- Workers’ Compensation/History of Sick Days
- Prior Arrests – being arrested is not the same as being convicted.
- Current Military Service and Type of Discharge from any Previous Service – you can ask if an applicant was formerly in the military, but enquiries should be limited to length of service, final rank upon discharge, and the type of applicable work experience gained in the military.
- Sexual Orientation
- Past Bankruptcies or Garnishment of Wages – employers may still use credit reports in their hiring process, but they must ensure that they comply with the Fair Credit Reporting Act, as well as any applicable state privacy laws.
- Frequency of and/or Treatment for Illegal Drug/Alcohol Abuse – some very limited questions about illegal drug use are technically permitted. Specific questions such as, “Do you currently use illegal drugs,” “Have you ever used illegal drugs?” and “What types of illegal drugs have you used in the last 6 months?” can be asked, but to be safe, these are better left to HR experts.
- Clubs/Organization Memberships – you can, however, ask “What professional or trade groups do you belong to that you consider relevant to performing this job?”
- Home/Car Ownership – you can ask if the applicant has a reliable method of getting to work.

Take Away: While prohibited questions can be quite specific, a good rule of thumb if ever in doubt about a potential question is “If it’s not job-related, don’t ask.”



#11

Reference Checking

The responsibility to check references is an essential part of due diligence and should not be delegated or passed off to others. Without checking references, there is no way to check the veracity of the applicant's claims about education, experience, and accomplishments.

While many people claim to have almost psychic skills when it comes to sensing the integrity and character of applicants, it must be clearly understood that scam artists and others who lie professionally are often considered to be the most genuine and convincing of people. In other words, the person most adept at being sincere and in giving the answers you want to hear is quite possibly the applicant with the most to hide. The rule must be: Don't ever accept an applicant at face value. Do your homework and check references carefully!

Reference Check Requirements and Techniques:

- Reference checks should be conducted by the hiring manager.
- Conduct reference checks after you have completed the final interview.
- If possible, contact the applicant's supervisors from at least the past five years.
- Get the applicant's written permission to check references during the interview. Verify the name, title, location, and contact information of each listed reference and any others you may wish to talk to.
- Ask the applicant to contact each desired reference, asking if it would be alright to accept a reference call from the hiring manager at a time of his or her convenience.
- Contact each reference. Promise absolute confidentiality and make sure you keep that promise.
- Create the tone of a trusted colleague, a fellow professional who knows the applicant well, who might hire the applicant, and who will be better able to manage the applicant if the reference will share certain insights.
- Contact the current supervisor (if applicable). Some applicants may not desire this until they have an offer that is formally accepted. If this is the case, ensure that the applicant understands that the offer is contingent upon receiving a clean bill of health with no surprises from the current supervisor.
- Depending upon the type of position being filled, the hiring manager may want to check references with peers, subordinates, or customers of the applicant. The same requirements mentioned above will apply.
- Take notes during all reference checks using the [Reference Check Form, PCPM Form 108](#). Keep notes for at least six months so you can refer back and see how your interview impressions and the references disclosures dovetail with your actual experience with any hired individual.

Take Away: Checking references is a critical part of hiring process and must be done with due diligence.



#12

Screen for Success

The Ritz-Carlton hotel company, renowned for its “legendary service,” has devised a new hire screening process that focuses on 11 basic talents and every position in the company is indexed on how much of each talent that position needs. For example, a housekeeper position needs high levels of “exactness” (attention to detail) because there are over 150 items or details that must be checked in every room every day; on the other hand, front desk and guest service employees need high levels of “relationship/engagement” skills to interact and engage guests in a multitude of ways.

The hiring process with Ritz-Carlton can take up to eight separate phone and face-to-face interviews to ensure they hire people with the right set of talents for the positions they seek. One impressive element of the interview process is that specially-trained line employees conduct the first telephone screening interview to ascertain the candidates “Talent Index.” If the candidate does not meet certain minimum levels in this interview, they do not receive further consideration.

The success of their screening process can be seen by their employee turnover rate. When first started in 1983, the company experienced a 73% annual turnover rate. In 2005, it was 23% with 15 of that 23% being voluntary resignations for a variety of reasons.

The same screening discipline, though more limited due to budgetary constraints and lack of economies of scale, can be used by clubs to ensure the right persons are hired for the right job. There are a number of companies that offer personality assessments used in hiring and such a service may be cost-effective for a standalone operation. A quick search of the Internet will yield such companies.

By using the principles of Disciplined Hiring a club may significantly improve its hiring success rate while improving member service when employees have the right personality and interpersonal skill set necessary for each position.

Take Away: Jim Collins, in his *Good to Great* book, speaks of the importance of getting “the right people on the bus” and getting “the right people in the right seats on the bus” as an essential discipline for success.



#13

New Hire Onboarding

The purpose of an onboarding plan is to ensure that new employees are welcomed to the club, receive the appropriate orientation and introductions, and are indoctrinated into the club's culture, as well as receiving a basic introduction to club information, employee benefits, club policies, and work rules. When the onboarding process is formalized and consistent, all employees have an appreciation for the history and traditions of the club, an awareness of their job requirements, and a common understanding of expectations for their conduct and performance.

One club's onboarding process included:

- Completion of all new hire paperwork with the HR office. Order nametag.
- All required screenings and/or physical as required.
- Welcome from the general manager or other senior executive.
- Club orientation, tour, and introductions to key staff by the HR manager.
- Receipt of Employee Handbook with instructions to read within first week and sign, date, and return the acknowledgement form.
- Review of club dress code, grooming, and hygiene policy.
- Issue of timecard/badge and timekeeping/pay cycle orientation
- Initial club training to be completed within 30 days:
 - Club culture training and issue of pocket values card.
 - Service ethic training, introduction to the *Daily Huddle* discipline.
 - Club etiquette training.

The departmental onboarding process included:

- Department head welcome.
- Departmental orientation, tour, and introductions conducted by the department head.
- Review of department functions, responsibilities, plan, and goals by department head.
- Review of club culture in departmental context by department head.
- Review of job description, performance expectations, and performance review forms.
- Issue of uniforms and nametags, review of dress code.
- Safety briefing, to include any hazardous materials or machinery and equipment, Material Safety Data Sheets, personal protective equipment if required, and emergency and accident instructions.
- For administrative workers, workspace set up, fully prepared, and waiting for the new hire.
- After several weeks, a meeting with the new hire to see how he or she is settling in, to answer any questions, and to once again reinforce basic club values and departmental policies.

Take Away: There is much basic information that new employees must know. A formal onboarding process will ensure new hires consistently receive such information.



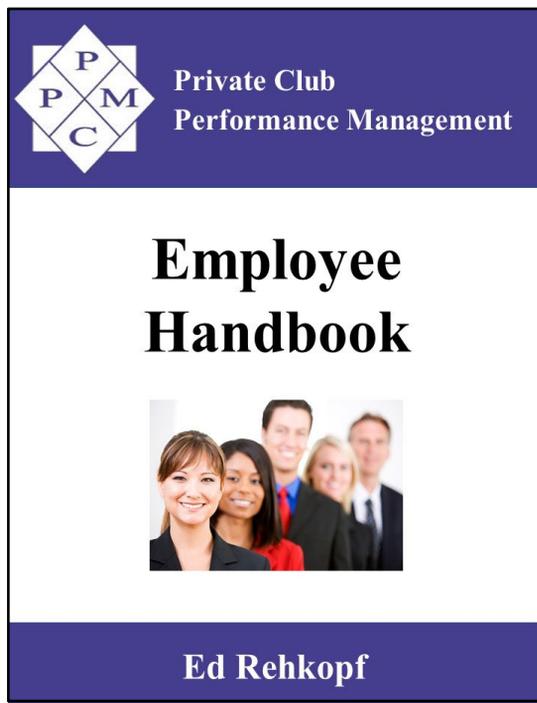
#14

Employee Handbook

New hires must be indoctrinated into the club culture and be given all the basic information they need regarding employment at the club. While every club will want to cover its own topics and priorities, a representative example would include:

- Welcome Statement
- Club Mission, Vision, and Culture of Service
- Laws Governing the Workplace
- Club Employment Policies
- Work Policies
- Benefits and Eligibility
- Safety and Security
- Conduct, Discipline, and Discharges

Given the importance of these topics, it's also a good idea to have employees sign an acknowledgement statement, such as [PCPM Form 118](#), indicating they've received and read the Employee Handbook. The signed acknowledgement form should be included in each employee's personnel file.



Take Away: An Employee Handbook is a tool to ensure that all new hires receive the same, consistent information about employment at the club. As such, it's an essential part of every employee's onboarding process.



#15

Work Policies

A club should spell out its work policies, so all employees have a common and consistent understanding of various work requirements. Here are the work policies covered in one club's Employee Handbook:

- Role of Supervisors
- Importance of Attitude
- Bulletin Boards
- Posting Notices
- Departmental Meetings
- Punctuality
- Sickness
- Absences
- Notification
- Inclement Weather
- Meal Breaks
- Rest Breaks
- Safety
- Accidents
- Emergencies
- Productive Use of Work Time
- Time Clock & Timesheets
- Appearance & Attire
- Uniforms
- Nametags
- Grooming & Hygiene
- Trash/Litter
- Telephone and Cell Phone Use
- Loitering
- Driving Club Vehicles
- Employee Freelancing
- Visitors
- Employee Parking
- Employee Lockers
- Lost & Found
- Cashing Checks
- Advance Pay
- Loans to Employees
- Removing Items from The Premises
- Use of Tobacco Products
- Chewing Gum
- Personal Habits
- Confidentiality of Club Affairs
- Security
- Solicitation/Distribution
- Electronic Communication System
- Personal Electronic Equipment
- Fire Safety Systems
- Use of Facilities
- Protection of Property & Assets
- Employees Benefiting from Member Activities
- Problems & Grievances
- Open Door Policy
- Providing Notice
- Exit Interviews
- Suggestions

Take Away: Club management must spell out basic work policies consistently for all employees and the managers who must enforce these policies consistently.



#16

New Hire Orientations

Orientations are an important part of the onboarding process for new hires. There is much for the new employee to learn about the club and the way it does business, as well as an explanation of work rules and employee benefits. Given the amount of material the new employee needs to learn, two separate orientations are recommended – a Club Orientation presented by the HR manager covering broad topics of interest to all new hires and a Departmental Orientation given by individual department heads covering topics specific to the department, as well as to reinforce certain club-wide topics.

Here is a list of suggested topics to cover in the Club Orientation:

- Issue Employee Handbook
- Discuss club values, culture, and standards of service
- Explain employment status (full time, part time, seasonal)
- Explain employee personnel file
- Explain performance reviews and introductory period review
- Explain work week, pay cycle, paydays, and overtime pay
- Explain benefits and benefits eligibility
- Explain designated employee parking areas and locker availability
- Explain club alcohol, drug, and tobacco policies
- Discuss prohibition of removing items from club premises
- Discuss club training process and programs
- Discuss discrimination, harassment, and sexual harassment
- Explain who to see for departmental problems/complaints/requests
- Explain who to see for personnel and benefits issues
- Tour of property and introduction to key staff

Departmental orientations will reinforce some of the key issues above and also discuss:

- Work schedules
- Club and departmental work policies
- Employee development, counseling, and discipline
- Uniform, nametags, appearance, and grooming policies
- Breaks and meal policies
- Review of job descriptions, work expectations, and performance review forms
- Departmental training
- Accidents and emergencies
- Notification for absences and late arrivals to work
- Timekeeping and resolution of pay issues
- Need to bring issues, problems, complaints, and suggestions to supervisor.

Take Away: New hire orientations are an important part of the employee onboarding and training process. They also present an opportunity to formally welcome the new hire.



#17

Employee Development

As a group of people committed to common goals, your team's greatest potential can only be achieved by taking advantage of the talent, initiative, and ingenuity of each one of your employees. To the extent that any individual is not valued, trained, and motivated, your enterprise suffers.

It is the responsibility of leaders at all levels of the club to ensure that employees are developed to their fullest potential and that they are trained in all aspects of their jobs. Because most clubs are large and complex, involving hundreds upon hundreds of details, there is much for employees to learn and know.

From the club's perspective, the desired outcome of the hiring process is to hire, train, and retain quality people who will make a positive contribution to the success of the enterprise. As leaders, you have a vested interest in the success of your employees. You want them to succeed because they will help you succeed.

The surest way to guarantee their success is to create the environment and training programs that ensure the fullest development of their potential. This development of the abilities and skills of employees is an ongoing process requiring your continual interest and active participation.

There are currently 40 [Professional Development modules](#) on the PCPM Marketplace store that serve as an excellent and reasonably priced means of providing a critical and holistic education in private club leadership and management best practices.

Take Away: Managers and supervisors have a vested interest in the success of their employees and must create the environment and training programs to ensure their fullest development.



#18

Job Descriptions

Job descriptions describe the principal duties of a position. It is a manager's responsibility to establish written job descriptions for each position in his department and to keep them current, as duties may change over time.

Job descriptions are also helpful in determining the necessary knowledge, skills, and capabilities a candidate must have to meet the requirements of a position. Such a position analysis is helpful in the hiring process and in preparing job vacancy notices.

All job descriptions should contain the following information:

- Job title
- Department
- Reports to, i.e., supervisor's title.
- Concise summary of the position's function or role.
- A listing of the of principal duties and responsibilities of the position.
- A statement that employees must "perform other duties as assigned." This general catch-all phrase is designed to prevent the "it's not my job" syndrome, though if a specific duty becomes a routine part of the job, the description should be revised to indicate the new principal duty.
- Whether the position is supervisory, i.e., whether its function includes supervision of other employees.
- An employment classification indicating whether the position has been determined as exempt or non-exempt from the overtime provisions of the Fair Labor Standards Act.
- Any potentially exclusionary requirements of the position, such as physical lifting, need to speak English, or appropriate levels of vision and hearing that may or may not be met with reasonable accommodation.

Managers and supervisors must review a position's job description with candidates during the hiring process to ensure they understand the requirements of the position. Further, during the onboarding process of a new hire, the manager must again review the position requirements and performance review form (or performance criteria) for the position to ensure the employee understands how his or her work will be measured and reviewed.

Check out the selection of [Job Descriptions for Private Clubs](#) on the PCPM Marketplace store.

Take Away: Well-thought-out, written job descriptions are important part in the overall training and development of a new employee



#19

Staff Notes

One of the most important things a supervisor can do to ensure meaningful employee development is to keep daily or weekly notes on the performance and conduct of all employees under her supervision.

Staff Notes serve as a detailed and factual basis for informal discussions of an employee's performance and progress, for detailing specifics during performance reviews, and as backup and support for counseling and/or disciplinary actions.

All supervisors are encouraged to keep a small notebook for this purpose. The few minutes a day that it takes to record events, errors of omission and commission, work problems, superlative performance of duties, and conversations with or instructions to individual employees, will pay immense dividends in employees' development.

Such records allow a supervisor to identify and recognize outstanding employees, to discharge the problem employee without difficulty, and to develop each employee to his fullest potential through meaningful feedback.

Caution: All entries in Staff Notes must be indicate a high degree of professionalism and maturity of judgment. This is not the place to vent frustrations, call the employee names, disparage the individual, engage in unsubstantiated gossip or emotional outbursts, or write any comments that could be construed to demonstrate a bias or an "out to get the employee" attitude. While Staff Notes are an effective way to keep track of specific employee behaviors and performance, they could be subpoenaed in a court case and could prove embarrassing to the manager when inappropriate and unprofessional entries are brought to light.

Take Away: Staff Notes are an effective way to record individual employee behaviors and performance to provide specifics in counseling or disciplinary sessions and performance reviews.



#20

Performance Review

Performance reviews are periodic, formal feedback sessions that help measure an employee's contribution to the overall effort. Reviews give important feedback to employees, reinforcing those things they do well while helping them improve in areas where their performance is weak. As such, they are part of the ongoing training and staff development efforts of the club.

Performance reviews must include an opportunity for the employee to give feedback as well. A performance review should be a dialogue with nothing finalized until the session is ended.

Prior to a performance review, a supervisor must explain to an employee the criteria by which his performance will be judged. This is only fair, as everyone deserves to know those things by which their work will be evaluated. The perfect time to share and explain the Performance Review form is upon hiring when the supervisor provides the employee a job description and explains the functions of the position.

The purpose of any performance review is to obtain the best possible performance from each employee by positively reinforcing desired skills and behaviors while developing her full potential by coaching and constructively correcting those behaviors that need improvement. The basic concepts behind achieving optimum performance from each employee are to:

- Set goals and expectations the first day of employment and adjust and reinforce them during the entire period of employment.
- Coach along the way, correcting when necessary and reinforcing positive performance.
- Ensure that any performance review is not a monologue by the supervisor; rather it should be a dialogue between the employee and supervisor to reach a mutual understanding of what optimum performance is and how to achieve it.
- Set goals for the next session and discuss how to accomplish them.

Discussion Points: Discuss performance reviews and why it's important for all employees to know what's expected of them and how they will be evaluated for their performance. Relate and discuss stories of ineffective reviews individual managers may have received in their work careers.

Take Away: Performance reviews are an important part of the employee development process.



#21

Performance Review Principles

- Reviews must be based on specific facts, not generalities. Managers should keep Staff Notes throughout the review period on the strengths and deficiencies of an employee's work. If this is done, a manager will be able to provide a meaningful review based on actual fact and will be able to give relevant examples to the employee to ensure he or she understands.
- For consistency and fairness' sake every employee filling the same positions, regardless of race, gender, religion, age, etc., should be reviewed by the same criteria. Not to do so opens the club to discrimination complaints.
- Reviews should be honest, fair, and candid. No manager should attempt to avoid conflict with an employee by giving an overly positive evaluation. Such an evaluation could be used as evidence of satisfaction with his work in a wrongful termination case.
- Managers must make it clear to employees that it is their responsibility to influence management's perceptions of their work. If they make no effort to influence these perceptions and their supervisor has negative perceptions, she should never feel hesitant or uncomfortable telling them so.
- If managers make on-the-spot corrections and hold counseling sessions when necessary to correct an employee's work, a less than positive review should never come as a surprise to the individual.
- Performance reviews are only as meaningful and useful as the effort put into them by the supervisor. There are few things that can destroy an employee's motivation and commitment faster or more completely than a hasty, ill-prepared, and perfunctory evaluation. Put the appropriate effort into the development of your employees to get their best efforts.
- While there may be areas of disagreement between you and the employee regarding his performance, it is ultimately your responsibility to rate him according to your standards and expectations, as well as your perceptions of how well he did. In other words, do not pull punches for the sake of agreement. If you do decide to give him the benefit of the doubt, make sure he understands that you are doing just that—but you still have reservations about his performance, and he will need to show improvement in the coming period.

Discussion Points: Discuss each of the above principles and why they contribute to a consistent, fair, and professional performance review program.

Take Away: Performance reviews must always be conducted professionally and be given the proper time and attention befitting the serious and important developmental process they are.



#22

Conducting Meaningful Reviews

The manner in which the review is conducted will have a lot to do with its success. Here are the steps in a meaningful review process:

- Schedule a quiet place, make sure you have enough time, and don't allow interruptions.
- Prepare for the performance discussion. Gather your recollection of events, Staff Notes, Records of Employee Counseling, as well as comments from other leaders, organize your thoughts and make an outline of the topics you wish to discuss. Be thorough. Your preparation is key to a successful dialogue and outcome.
- Be informal, make the employee feel comfortable. Set the tone of the discussion during the meeting by restating the objectives and the role you and the employee will take in the discussion.
- People want to know what the score is. Start by telling him the overall rating. If he knows the rating up front, he is more likely to participate and listen to what you have to say. Explain that the rating may change as the review progresses.
- The rest of the review will focus on the elements that make up the rating. During the discussion, be candid, sincere, and be prepared to listen to the employee. The more the employee talks, the more he will remember and understand his part in the process.
- Be open to changing any of your criteria ratings if the employee provides convincing reasons why you should. Sometimes a supervisor's perceptions are based on faulty or partial information and a willingness to be fair may go a long way toward gaining the employee's trust, cooperation, and commitment.
- The performance review is a discussion about past performance. Its primary values are to recognize superior performance and review opportunities for improvement. While this review is important and is the basis for an employee's overall score, the most productive review discussion should be focused on future performance and expectations. Typically, a productive review discussion would focus more than half of the time on the future.
- Finalize the discussion by setting expectations and laying out specific goals to accomplish prior to the next review.
- After the meeting, fill out the performance review form thoroughly and accurately, reflecting the dialogue, your assessment of the employee's performance, and the agreed upon goals for improvement during the coming period.
- In a follow-up meeting, present the completed review, go over it with her, and ask her to sign the form. If she chooses not to (and it is her choice), simply note this on the form and move on.
- Give the employee a copy of the review and ensure the original goes in her personnel file.

Discussion Points: Discuss the above points and how they contribute to a successful and meaningful review. Ask managers to contrast the results of this process with other reviews they've received during their careers.



Training

While many managers find it difficult to devote the time, resources, and effort to proper training, they miss the forest for the trees. When a club has a well-trained staff, more problems are avoided, the quality and quantity of work is better, problems are solved more easily at lower levels, member complaints are minimized, and time spent to correct errors decreases. Further, management has more time for organizational issues, planning, continual process improvement, problem solving, member engagement, and taking advantage of opportunities.

A prevalent method of training in the hospitality industry is called “trailing.” This takes place when the new employee follows a long-term employee around. The idea is that the new employee will learn all the right things from the veteran. This, of course, assumes that the veteran was properly trained, knows what he is doing, is conscientious, and so forth. While there is nothing wrong with appointing individual employees as departmental trainers, they should be selected based on knowledge, teaching ability, patience, conscientiousness, and quality of work. Still, the trainer must have a well-organized, fully-prepared training program to ensure the necessary information is passed on to new hires thoroughly and consistently. Finally, the supervisor must monitor the process to ensure the new hire receives correct and consistent information and learns all the right skills.

Determining what skills and knowledge are necessary for each position is easy if the supervisor has created thorough job descriptions. For instance, if one of the principal duties of a cart attendant is to welcome golfers to the club and assist them with their cart, then the trainee needs to know how to greet a member or guest, how to help them with their bag, how to instruct them on the use of the cart, pertinent course information such as course distances measured to the center of the greens, how to show them the pin placement sheet, how to answer any questions about club events and services, etc.

Formal training should be conducted in frequent, small blocks of time and material. Do not expect a new hire to grasp the multitude of details and instructions received in the first few days of training. Plan for appropriate breaks and intersperse classroom instruction with tours and demonstrations. The best way to teach someone a new skill is to tell her how to do it, show her how to do it, allow her to do it, and constructively critique her effort. Not everyone has the same comprehension skill. It may require several sessions to teach a particular skill. Supervisors should also create a list of the competencies that must be learned for each position and check each off as the employee masters it.

Finally, department heads should never assume that others will do the necessary training of their department’s new hires. While the HR manager provides certain training, it is the department head’s responsibility to ensure that employees are properly trained.

Take Away: There are significant benefits to a well-trained club staff, but proper training requires well-organized and disciplined management to undertake the challenging effort.



Types of Training

All who work in the service business understand that operations are both people-intensive and detail-intensive. It takes a lot of employees to provide the requisite levels of service and every aspect of service involves many details. These two facts make detailed, ongoing training an absolute necessity for any successful operation.

There are a wide variety of topics that must be taught to both managers and employees to fully prepare them for their jobs.

1. **Leadership Development Training** for managers and supervisors – designed to foster consistent, club-wide leadership skills, which are the driving force behind the club’s success.
2. **Club Culture Training** for all employees – designed to foster a thorough understanding of the club’s values and service ethic.
3. **Organizational Systems Training** such as Human Resource and Accounting Standards, Policies, and Procedures (SPPs) for managers and supervisors, as well as departmental SPPs for employees – all designed to teach the underlying systems that permit the enterprise to operate efficiently.
4. **Legal Compliance Training** for managers, supervisors, and employees – designed to provide all required training in matters with legal implications for the club such as Equal Employment Opportunity, Fair Labor Standards Act, Sexual Harassment, and others.
5. **Liability Abatement Training** for managers, supervisors, and employees – designed to limit the club’s liability exposure for occupational safety and health, food sanitation, public health, and responsible alcoholic beverage service.
6. **Departmental SPPs, Organizational Systems, Job Skills and Service Technique Training** for employees – designed to give each employee the knowledge and skill set necessary to perform his job and meet standards of service.

Items 1 through 5 above should be developed by the club and provided club-wide for consistency’s sake; item 6 is specific to each department and should be developed and taught by individual department heads.

Take Away: Managers tend to think that training is only necessary for line employees, but as the list above suggests, much of the training is required for management staff.



#25

Etiquette Training

Thirty-five years in hospitality management have proven to me that etiquette is a basic training requirement for all club employees. To expect that a wide assortment of employees with diverse backgrounds and socio-economic life experiences will have an appropriate understanding of the expected behaviors and decorum for a private club is unrealistic.

So, like any other management expectation of its employees, such as dress and grooming standards and the requirements and rules of conduct, club etiquette must be taught consistently to all employees. To ensure this consistency, several years ago I created a Power Point presentation that presented and discussed the concept of good manners under the following six topics:

- Respect for others, both members and fellow employees.
- Common courtesies such as attitude, mood, and smiles; using names and titles when addressing members; using please and thank you, yes ma'am and no sir; interrupting personal conversations; stepping aside and holding doors; offering assistance; inappropriate personal habits such as smoking, drinking, eating, and chewing gum in front of members; and the need to take breaks out of view.
- Appropriate and inappropriate words and phrases and the need to act naturally and sincerely in all dealings with members.
- Body language and how it can convey unintended messages.
- The importance and impact of tone of voice.
- Alertness and responsiveness to members at all times.
- Focus on the task at hand and satisfying members.

This presentation was designed as a basic introduction to appropriate behaviors and decorum in the club, but it was fully expected that managers and supervisors continue to reinforce and expand upon the concepts of club etiquette in all they said and did. Most importantly, club etiquette would be continually discussed in *Daily Huddle* meetings where actual service situations and issues are reviewed.

The end result of basic club etiquette training and ongoing discussion of appropriate behaviors and decorum is a staff with a uniform understanding of the finer points of service in all their interactions with members and guests.

Take Away: To expect that a wide assortment of employees with diverse backgrounds and socio-economic life experiences will have an appropriate understanding of the expected behaviors and decorum for a private club is unrealistic. They must be trained.



#26

Training Requirements and Principles

Before establishing training requirements, the club must determine in great depth its operating standards, policies, and procedures. They are, after all, the backbone of any organized system of training. But there are certain things necessary for a training program to be successful:

- Leadership – the will to make it happen.
- The necessary focus and attention.
- Designated responsibilities and accountabilities.
- Established training objectives, standards, guidance, and budget.
- Curriculum development for each position.
- Administrative system or software to monitor and track training compliance.
- Training benchmarks and reports to track time and costs of training effort.
- Standardized list of teaching aids and equipment to facilitate training.

There are a number of principles which affect the development and implementation of a club's training effort:

- Not all employees learn equally well or fast; and not all employees find the same teaching methods conducive to learning. Therefore, there is a need to develop training formats that meet the needs of all learners. Such formats will include self-study manuals, checklists, handouts, quizzes, videos, Power Point presentations, On the Go Training material, scripting of key member interfaces, and ongoing discussions at staff meetings.
- Training employees is not a one-time task. New employees must receive consistent initial training, but the amount of material that must be mastered requires that initial and refresher training be given in most topics and job skills.
- Some sort of *Daily Huddle* should be used by every department every shift to inspect staff, remind them of important service details, provide On the Go Training, and ensure every employee has the proper mind-set and enthusiasm to deliver high levels of service.
- Some training, such as the topics of sexual harassment and safety, is required by law. Because of legal and liability issues, such training must be consistently taught throughout the club and thoroughly documented.
- All individuals tasked with training responsibilities must be trained. Completing a Train the Trainer class is a prerequisite to training other employees.

Take Away: In establishing a formal discipline of training the club is undertaking an extremely challenging endeavor. While it adds a number of time-consuming tasks to already busy schedules, it ultimately will make everyone's job easier.



#27

Initial and Ongoing Training

As we have said before there is much that new hires must learn in the detail-intensive club business. We have also said that the sheer amount of material that must be learned by new employees is difficult to absorb all at once. Finally, we have pointed out that different people learn in different ways and that training material must be provided in various formats that meet the needs of all learners.

What all this means is that the training needs of the club and for each position in the club must be carefully identified, designed, and deployed. In the broadest sense, the club must decide what training topics and skills are considered critically important and skills that new hires must learn immediately and what topics can be taught in the initial period of employment. Beyond this, there are important topics that require ongoing review, as well as required training that must be given and documented on a regular basis (usually annually) such as sexual harassment and safety topics.

Given these needs, the club and department heads must design new hire orientations, both club and departmental, to cover and reinforce critical information and skills that employees need to know. Then each department head should design his or her department's initial training requirements based on the necessary curriculum for each position. These topics should be documented for each new hire as they are completed.

Finally, recognizing the need to continually reinforce key standards, policies, and procedures, as well as to meet legal requirements and avoid liability issues, refresher topics must be scheduled, taught, and documented on an ongoing basis.

As an aside – the Ritz-Carlton hotel company believes initial training to be so important that new hires are not allowed to interact with hotel guests until they've completed their basic training. As they say, they don't allow their employees to "practice" on their guests.

Take Away: A formal program of training should be designed to cover training topics on an immediate, initial, and ongoing basis.



Training Curriculum by Position

The first step in preparing a curriculum is to analyze any position in detail and develop an outline of the knowledge, information, and skills that the employees in that position must master. Most of the knowledge and information can be read, studied, and reviewed by the new hire, but many of the service techniques and skills will need to be demonstrated by the supervisor and then practiced by the employee to ensure proficiency.

Below is a sample listing of topics for a dining room server. This list is necessarily abridged for space considerations but gives some idea of the level of detail that must be mastered.

General Knowledge	Meeting/Greeting/Seating
Food	Table/Section #s
Alcoholic beverages	Reservations
Tableware familiarization	Table selection
Food service policies	Seating and assistance
Service protocols/sequence	High chair/booster seats
Service etiquette	Menu presentation
Uniform/dress code	Wine list presentation
Personal hygiene	Daily specials
Dining room familiarization	Table Service
Kitchen familiarization	Beverage order
Location of supplies and stocks	Food order
Point of Sale Training	Food service techniques
Opening ticket	Wine service
Ordering/changes to order	Beverage service
Closing ticket/member charge	Clearing courses
Adjustments/voids	Dessert service
Club Fare Familiarization	Coffee service
Lunch/Dinner menus	Presenting charge ticket
Menu selling sheets	Table resets
Dessert menu	Special Service Issues
Beverage selection	Differently-abled patron
Beer selection	Children
Wine selection	Elderly
Spirits/Cordial selection	Responsible Beverage Service
Specialty drinks	Resolving complaints
Daily specials	Difficult member/guest
Condiments	Slow service
Pre-Shift Setup	Adjustments
Table settings	Member Service
Section prep	Greeting
Dining room sidework	Engagement
Kitchen prep	Inappropriate words/phrases
Reservations	Body language
Pre-shift meeting	Tone of voice

Take Away: In order to train new hires consistently and completely, managers must develop a curriculum for each position and then ensure all training topics are completed.



#29

Training on the Go

Clubs face a challenging training burden if they are to deliver the high levels of service expected by their members. Yet with tight budgets how can managers meet their training obligations while controlling costs since every hour of training is a payroll hour for each employee being trained? Add to this the difficulty of getting all departmental or section employees together at one time for a formal training session.

The answer to these challenges is to build training programs around the “on the go” concept where ongoing training material is formatted in brief – no more than five to ten minute – sessions. In every shift, in every club department, there are spare moments, time when employees have finished their shift preparations, time when employees are socializing among themselves or awaiting instructions from supervisors. Since the club is already paying for this time, put it to good use.

In every department there are hundreds of operational details that employees must learn and be reminded of with some frequency. This is just as true in golf operations, golf course maintenance, aquatics and activities, as it is in food and beverage. All that is necessary is for the department head to outline training requirements in brief doses and format them so they can be pulled out at a moment’s notice for either group-led or individual instruction. One manager who used Food and Beverage Training on the Go found that the most effective way to use this material was to assign employees the task of teaching each other specific on-the-go topics.

With today’s ability to find anything on the Internet with just a few keywords and keystrokes, all the information needed to teach employees values, etiquette, product knowledge, safety, security, sanitation, HR requirements, responsible beverage service, or how to operate or maintain any piece of equipment is readily available. It just has to be formatted for easy use.

Private Club Performance Management has developed a number of [On the Go Training programs for food and beverage, human resources, values, safety, leadership, and management disciplines](#). These offer a proven model of how easy it is to format material and train employees to increase their knowledge, skills, abilities, and service techniques.

Take Away: Given the amount of training that must be done in the detail-intensive club environment and the high cost of training, managers should use the On the Go Training concept to create and use short lessons that can be used in the spare moments of every shift.



Terminations

Other than for retirement an employee terminates employment with the club under one of four conditions:

Voluntary Quit:

- This occurs when an employee decides to leave the club's employ of her own volition.
- An employee may notify the club of her decision to leave the club orally or in writing.
- If notification is oral, the department head should have the employee sign the [Personnel Data Sheet \(PDS\), PCPM Form 104](#), giving the effective date of the termination.

Abandonment of Position:

- This occurs when an employee fails to show for work for three consecutive scheduled shifts and does not notify his supervisor of his intention to quit.
- In this instance, the department head should fill out a Personnel Data Sheet (PDS), PCPM Form 104, indicating that the employee abandoned his position with the effective date listed as the last date worked.

Layoff. Layoffs occur when the club involuntarily terminates an employee due to a lack of work. This only affects full time and part time employees since seasonal staff know when they are hired that their employment is of limited duration.

Discharge. Discharges occur when an employee is terminated for "cause," either misconduct, unsatisfactory performance or under at-will provisions. All discharges must be reviewed and approved in advance by the general manager to ensure the reasons are appropriate based on the written record.

- *Personnel Policy, P-200.18*

Documentation of Separation. *It's always a good idea to complete an [Employee Separation Document, PCPM Form 117](#), for all terminations, regardless of reason. Such documentation provides a clear record of the reasons for each departing employee. This may be important in case of unemployment compensation disputes, lawsuits, or a former employee reapplying for employment.*

Take Away: Managers and supervisor must understand the differences in the types of terminations and follow all required policies and procedures for each.



#31

Principles of Disciplinary Systems – 1

Discipline is necessary to maintain the performance of the club and to establish and maintain standards of quality and service. The desire is to achieve excellence and success and supervisors must understand that these goals are dependent upon the quality and commitment of the staff.

Unfortunately, in every group of employees, there are some who have attitude problems, lack commitment, or are not capable of meeting standards. When confronted with such a problem employee, it is the responsibility of supervisors to deal quickly and effectively with the situation before it degrades the efforts of the rest of the staff.

- **Supervisors' Responsibility.** It does no good to have rules, regulations, and policies spelled out, if they are not going to be enforced by all supervisors. Whenever a supervisor overlooks an infraction, he encourages others to similar violations; such a supervisor can be more damaging than no supervisor at all. So, supervisors are expected to actively confront any problem employee in their departments with the aim of correcting the problem. If it cannot be corrected in a reasonable period, supervisors are expected to discharge the individual while following established policies.
- **Good Communication.** Good communication is important when working with a problem employee. Some supervisors do not like to confront staff on seemingly small issues. As a result, many small problems build up until the supervisor finally blows his top and is ready to fire the employee. However, discharge is inappropriate because the supervisor has not previously discussed the problems with the employee, warned him of the consequences, or offered any help to correct the problem. Good communication would prevent this situation. If the supervisor talks frequently with employees, points out minor problems as they occur, addresses continuing problems in a proactive and formal way, an employee will never be surprised should he be discharged.
- **Disciplinary Philosophy.** The club subscribes to the “Hot Stove” approach to discipline. Employees are told what is expected of them and what the consequences are of ignoring rules, requirements, policy, and procedure. If they then touch the hot stove, they get burned. The rationale behind this philosophy is that supervisors want to deal with staff as adults who are responsible for their own actions, and they want to avoid inconsistency in applying rules, regulations, and policies.
- **Rules, Requirements, Policies, and Procedures.** This philosophy requires that supervisors tell staff what is expected of them. First, do this by spelling out in detail the club’s rules, requirements, policies, and procedures. The Employee Handbook contains many club-wide rules for employees. Second, expend some effort through orientations and formal training to make staff fully aware of their responsibilities and the club’s expectations.

Discussion Points: Discuss each of the above disciplinary principles and why they are important to a sound and progressive disciplinary system. Specifically discuss the pitfalls of not following these principles.

Take Away: Managers and supervisors must understand the principles that underlie the club’s disciplinary system.



#32

Principles of Disciplinary Systems – 2

Discipline is necessary to maintain the performance of the club.

- **Fairness and Consistency.** The club's disciplinary process must be fair and consistent. This will follow naturally from rules, requirements, and policies being applied fairly and consistently to all employees. Supervisors who are not fair and consistent will create major problems within their departments. There is no quicker way to destroy departmental morale and trust than to play favorites. Often the perception of fairness is as important as the reality. Supervisors should not only be fair, but also give all appearances of being fair.
- **Constructive and Progressive.** The club's disciplinary process is designed to be both constructive and progressive. By this it is meant that all disciplinary actions are aimed at correcting erroneous or inappropriate behavior and successive disciplinary actions will be progressively more severe. These two aspects are part of the same philosophy. While the club wants to help employees overcome their problems, when the problems continue, it wants to get the employee's attention with progressively more severe consequences.
- **Higher Standard for Supervisors.** Because of supervisors' positions, experience, training, education, and other factors that led to hiring, they are held to a higher standard of conduct and performance than line staff. In disputes between staff and supervisors, it is expected that supervisors will have solidly documented cases showing thorough investigation of any incident. While supervisors will always be supported when in the right, line employees will be given the benefit of the doubt when there is insufficient evidence or the absence of a thorough investigation. The best way for a supervisor to ensure that she is supported in her decisions is to have all facts together before taking disciplinary action.
- **Depends on Circumstances.** Most staff disciplinary actions are dependent upon circumstances. There is no cut and dried formula for handling any disciplinary action. Supervisors must rely on judgment to evaluate the circumstances. Having said this, it is still important for supervisors to be as fair and consistent as possible. A supervisor may be able to justify why he will give a "good" employee more leeway than a chronically "bad" employee, but there is still the danger of the perception of favoritism. If a supervisor discharges one employee for being late three times, but allows another to get away with repeated tardiness, he is opening the club up to a wrongful termination or discrimination suit.

Discussion Points: Discuss each of the above disciplinary principles and why they are important to a sound and progressive disciplinary system. Specifically discuss the pitfalls of not following these principles.

Take Away: Managers and supervisors must understand the principles that underlie the club's disciplinary system.



#33

Common Disciplinary Problems – Tardiness, Absenteeism, Notification

Coming to work when scheduled and on time is an important requirement for each employee. When an employee can't make it to work because of illness, unexpected situation such as a dead car battery, or family emergency, it is his responsibility to notify his supervisor of the expected arrival or absence as soon as possible.

Supervisors should note employee tardiness or absenteeism in departmental Staff Notes and speak with any employee who is late or absent without good reason. On the first offense, this may be a short discussion questioning the incident and telling him not to do it again. When a second or similar offense occurs without adequate excuse, the supervisor may decide to prepare a [Record of Employee Counseling, PCPM Form 103](#). This report should be presented to the employee in a private meeting. A copy is given to him for his records, one is saved for the supervisor's file, and one is sent to the HR manager for the employee's Personnel File. If the same or similar problems continue, the supervisor may want to give the employee a final written warning, or he may decide, in light of other concerns, to discharge him.

Absenteeism is a more serious matter because it involves covering work shifts with other staff and may entail overtime. Certainly, it hurts departmental morale as others are expected to cover the work on short notice. While always open to reasonable excuses, supervisors should make it clear to offending staff that this is a serious matter and cannot be tolerated. Depending upon circumstances, the supervisor may want to discharge an individual on the second offense.

Whenever a full or part time employee is absent on a scheduled workday, the supervisor must complete an [Absentee Record, PCPM Form 121](#), and send it to the HR manager. The completed form must include the reason she is absent and an expected date of return to work. This form is important in that it allows the club to properly pay the individual, as well as document any sick time.

Take Away: Tardiness, absenteeism, and notification issues are problems that must be addressed quickly and forcefully with the offending employee.



#34

Common Disciplinary Problems - Misconduct

Misconduct covers a lot of ground and is generally defined as failing to follow the rules, regulations, policies, and procedures of the club. Some misconduct is more serious. Fighting with another employee on the premises is probably grounds for immediate discharge for both employees. Though if it's clear that one was the aggressor and the other the victim, the supervisor may decide to discharge one and suspend the other for several days. It depends upon circumstances.

Most often, misconduct is less severe in nature. However, continual conduct problems, even of a minor nature, are aggravating and are usually indicative of an employee who has an attitude problem or is not mature enough to work for the club.

The key to successfully dealing with the problem employee is good documentation and communication. If a supervisor keeps good Staff Notes, meets with the employee to make him aware of the offending conduct, and documents any meetings, he should have no trouble in either rehabilitating or discharging him.

In any case of misconduct, the punishment should fit the severity of the offense. Disciplinary procedures are meant to be progressive, that is counseling or write ups for initial offenses, suspensions for repeated problems or more serious misconduct, and discharges after the supervisor has worked with the employee and given a final warning or when the offense is of a serious nature. It is also important that punishments be relatively uniform when different employees have similar disciplinary situations.

Supervisors who are unsure how to handle a particular case should consult with the HR manager or general manager.

Take Away: Conduct issues are problems that must be addressed quickly and forcefully with the offending employee.



#35 ***Common Disciplinary Problems – Unsatisfactory Performance***

Unsatisfactory performance results when an employee is not capable of doing his work to club standards. Frequently, this employee is not suited for his particular position or is incapable of working fast enough and/or with sufficient quality to meet the requirements of the position.

Supervisors are responsible for doing four things when dealing with an employee whose performance is unsatisfactory:

- Meet with the employee to discuss the unsatisfactory performance and give specific examples of unsatisfactory work. Staff Notes will be invaluable in providing this detail.
- In conjunction with the employee, prepare [an Employee Development Plan, PCPM Form 116](#), for improving his performance. This plan should be specific and include a timetable of expected improvement.
- Meet with the employee regularly during the plan period to review work, offer support and praise where warranted, and make corrections or suggestions. The desired outcome from this process is improved performance that will meet performance expectations.
- Document all discussions, meetings, the development plan, and keep thorough Staff Notes during the plan period.

If the employee rises to the occasion and improves his performance, he should be so informed. The supervisor may wish to maintain some sort of modified development plan and continue to monitor the situation for some period. All documentation from the incident should stay in his file in case there are future problems.

If he is unable to meet performance expectations, the supervisor may seek a discharge decision. To support that decision, he will need:

- One written warning of unsatisfactory performance in addition to any unsatisfactory performance reviews. There should be consistency in the record, i.e., there should not be “glowing” reviews in his file from the same time period that he was being counseled and worked with about his unsatisfactory performance.
- Documentation of meetings and an Employee Development Plan for improvement.
- A solid documentary case to show that he could not or did not improve his performance.

As with all discharges, the supervisor will need the approval of the general manager.

Note: Two other forms to use when attempting to rehabilitate an employee are [Employee/Departmental Goals, PCPM Form 135](#) and [Action Planning Sheets, PCPM Form 136](#).

Take Away: Performance issues are problems that must be addressed carefully, and efforts must be made to rehabilitate the employee before a discharge action is considered.



#36

Common Disciplinary Problems – Misuse of Sick Days

Sick/Emergency days are a benefit offered by some clubs to employees. Unfortunately, there are some employees who view sick days as additional time off even though they are not sick. They have no reservation about calling in at the last minute to tell their supervisor that they are sick and won't be in to work that day. The problem with this is twofold:

- one, they are lying; and
- two, they force the supervisor to cover the work with another employee at the last minute.

This is unfair to the other employee, hurts departmental morale, may degrade member service, and can result in costly overtime.

While desiring to take staff at their word when they call off sick, supervisors must be vigilant against the employee who misuses sick days to take time off when not sick. There are several tip-offs:

- Calling off sick frequently.
- Calling off sick on a pattern, i.e., before or after holidays, before or after regular days off, on the day after payday, etc. Patterns are easy to spot using the club's timekeeping software or by reviewing timecards.
- Calling off on particularly busy workdays; for instance, a kitchen employee calling off when there are large parties scheduled.

Supervisors faced with this type of behavior should counsel the employee against misuse of sick days and document the counseling session with a written Record of Employee Counseling. Keeping thorough Staff Notes will also help the supervisor document patterns of calling off sick.

The club's Personnel Policies require that an employee, who misses three or more days for illness, must have a doctor's certificate confirming the nature of his illness. As a supervisor, you also have the right to require any employee whom you suspect of misusing sick days, to provide a doctor's certificate each time he calls off sick, but he should be told of this requirement in writing in advance.

Again, fairness and consistency dictate that you have a documented record of excessive and patterned sick day usage. Often, simply requiring the doctor's certificate will reduce, if not eliminate, the problem.

The burden of providing a legible, well-documented doctor's certificate that provides a date, explains the nature of the illness, and is specific in the number of days and which days which the employee is excused from work, rests solely with the employee. If you are not satisfied with the doctor's excuse, ask for a more specific one. If you question the validity of the certificate, call the doctor's office to verify that the employee was seen as indicated.

If the misuse of sick days persists, write up the employee again. Remind him that your responsibility is to the club and getting the necessary work accomplished. Inform him that meeting his work schedule is his responsibility and that if he continues to have excessive or undocumented sickness, you will be forced to discharge him. Make sure that he understands that this is his final warning and that continued misuse of sick days will result in loss of employment.

Take Away: When an employee abuses sick day benefits to take additional time off, the supervisor must take action to put a stop to it.



#37

Common Disciplinary Problems – Bad Attitude

Because of the importance of attitude to the success of the club and of the direct impact of attitude on service, an employee who exhibits a chronically bad attitude as evidenced by a pattern of inappropriate behavior, can be discharged.

Disciplinary actions will not be based on the term “attitude,” but rather on the evidence of bad attitude as seen in facial expression, tone of voice, persistent grumbling, lack of cooperation, surliness, unfriendliness, lack of courtesy, uncontrolled temper, and constant complaining.

As with any other offending behavior, supervisors must document the problem and efforts made to correct it. If you doubt your judgment, get other opinions. Employees with bad attitudes are readily noticed by all with whom they have contact.

As with any other disciplinary action, when counseling efforts have been made and the behavior does not improve in a reasonable period, supervisors may choose to discharge the employee.

Take Away: Attitude problems must be addressed quickly and forcefully by managers and supervisors as this behavior strikes directly at the very heart of what hospitality enterprises provide.



#38 *Conducting Counseling / Disciplinary Sessions – 1*

How supervisors conduct counseling and disciplinary sessions has a lot to do with their success.

First, the meeting must be held in private, in a quiet, uninterrupted setting. The supervisor may wish to include a witness, such as a trusted associate or the HR manager. Do not use a departmental peer of the employee being counseled.

Second, the tone of the session should match the purpose.

- If the session is for counseling, the meeting should be less formal, more comfortable, and supportive. The conversation should focus on constructive criticism, problem discovery, and proposed solutions. While this should be done in a supportive way, it is also necessary to communicate to the employee the negative consequences of continued behaviors or problems.
- When the purpose of the meeting is disciplinary, the session should be formal and the tone serious. The idea is to impress upon the employee the serious nature her actions, the impending consequences if she does not improve her behavior or performance, and the issuance of the disciplinary report, suspension, or discharge, as the case may warrant.

Third, the investigation of any incident or documentation of a series of problems must be thorough and detailed. Supervisors must not go off half-cocked to write somebody up before investigating. Supervisors may have an incomplete picture of what happened and be embarrassed when the full story comes out.

Fourth, after telling the employee the reason for the meeting and relating the incident or allegations, the supervisor should give him a chance to tell his side of the story. He may have mitigating circumstances or a very different version of what happened. His story may require further investigation or corroboration. The supervisor may need to call other people in as witnesses or to contradict his version.

Fifth, after hearing his side of the story, the supervisor will decide what action to take and prepare the [Record of Employee Counseling, PCPM Form 103](#), describing the incident or problem, allowing the employee to offer any response, and providing a summary of the counseling or disciplinary action.

Last, the supervisor will present the employee with the Report and ask for his signature. If he chooses not to sign, so note it. Make sure the Report is complete. Provide the employee with a copy; send one to the HR manager for inclusion in his Personnel File and save one for the departmental files.

Take Away: How a manager conducts a counseling or disciplinary session has a great impact on the outcome.



#39 *Conducting Counseling / Disciplinary Sessions – 2*

The key to successful disciplinary actions is good documentation. Supervisors have two documentary tools at their disposal – Staff Notes and the Record of Employee Counseling.

- **Staff Notes.** As previously mentioned, Staff Notes are daily or weekly notes made about staff performance. They should contain instances of tardiness, absences, failure to follow instructions and procedures, complaints, arguments or disputes with other staff, instances of outstanding performance, etc. These brief notes are invaluable in helping a supervisor reconstruct circumstances, give details in review sessions, or document continuing disciplinary problems of a minor nature.
- **Records of Employee Counseling.** These reports are used for formal documentation of problems when the supervisor wishes to give the employee a copy. These reports must be filled out completely and accurately. If the supervisor fails to enter a date, fails to sign it, fails to present it to the employee, or fails to get his signature or note “chose not to sign,” the record may be useless as documentary evidence.

Right to Respond. Each employee subject to a disciplinary action or unsatisfactory performance review has a right to respond. Such response should come within 7 days of the report or review. Supervisors should consider the response, amend the report, or review if warranted, and attach the response without alteration to all copies of the disciplinary report or review (Personnel File copy and departmental copy).

Choosing Not to Sign. Employees are requested to sign all disciplinary reports and performance reviews but have an absolute right not to sign. The absence of the employee’s signature will not affect the validity of the document, so long as the supervisor notes that it was presented to him. If an employee chooses not to sign, the supervisor does this by writing “chose not to sign” and the date on the signature line. The words “refused to sign” should not be used as this connotes coercion or lack of choice.

Take Away: Counseling or disciplinary sessions must be documented in case the employee’s issues continue and/or a manager wants to take the disciplinary procedure to the next level.



#40

So, They Improve, Now What?

One of the questions posed by supervisors with any employee disciplinary issue is “OK, so he cleans his act up for a time, but then at some later point, it starts up again. What do I do then?” The answer as usual depends on circumstances.

If his behavior has been exemplary for a number of months and then there is one instance of the offending behavior without a reasonable excuse, you may decide to give him the benefit of the doubt. Certainly, you may do this, but don’t miss the opportunity to sit him down again, remind him of the consequences should he do it again, and document the session.

You may also decide in light of any number of issues – poor attitude, sloppy work, lack of teamwork, unwillingness to go above and beyond requirements, complaints received, member feedback, lethargic work performance, etc., that you’ll discharge him. This is also defensible, though the longer the period between this and his last offense, might cause the reasonable person to consider another, fresher warning.

If during the same period the employee had other documented incidents of misconduct and generally unsatisfactory performance, this would provide all the necessary cause to discharge the employee.

If in doubt, you should always seek the advice of the Human Resources manager or general manager.

Take Away: While employees deserve reasonable notice and discussion of infractions, misconduct, or poor performance, it is up to managers and supervisors to ensure that consistently applied standards are upheld and performance and service are not unduly impacted.



#41

Discharges

There are only two reasons to discharge an employee – misconduct or unsatisfactory work performance.

Misconduct is the most prevalent reason for discharge and is defined as failing to conduct oneself according to the rules, regulations, policies, procedures, and standards of the club. In most cases of misconduct, the employee will be counseled regarding his offending behavior and a written record will be made of the incident. Should he repeat the offending behavior or have other similar conduct problems, he will be written up again. If the problem continues, the supervisor should consider discharging the employee. In all cases, the general manager must approve the discharge and the supervisor must have evidence of corrective counseling and disciplinary reports to support a decision to discharge.

In the case of serious misconduct such as theft or fighting on the property, an employee may be discharged without the progressive steps of counseling and written disciplinary reports, though the supervisor should always give the employee an opportunity to present his version of what happened. Supervisors should consider any mitigating circumstances in the employee's version before deciding to seek a discharge.

Discharging an employee for unsatisfactory performance occurs less frequently and is a more involved process. The crux of the matter is that the club should show a good faith effort to work with an employee who is having trouble meeting her work requirements.

Evidence of this good faith effort is proper training, retraining as needed, and solid documentation that the supervisor has worked with the employee to try to help improve her performance. Such documentation would include Staff Notes, Records of Employee Counseling, Performance Reviews, records of meetings, an Employee Development Plan with a timetable for the employee to improve her performance, and written warnings to the employee that she is not meeting performance expectations.

No employee will be discharged for unsatisfactory performance without at least one written warning that specifically describes the items of unsatisfactory performance and includes an action plan for improvement. Again, no discharge will take place without the express approval of the general manager.

Take Away: Managers and supervisors must understand the reasons for which an employee may be discharged.



#42

How to Discharge

Immediate Discharge. If a supervisor seeks a discharge for serious misconduct, the employee should be sent home immediately and informed that she will be contacted for a meeting regarding the issue. The supervisor will then present the matter to the general manager at the earliest opportunity. When sent home in this manner, the employee is in a temporary suspension with pay category.

Once the decision has been made to discharge, the supervisor will contact the employee and tell her to come in for a meeting. It is against the law in some states to call an employee in on her regularly scheduled day off to terminate her. Therefore, to be safe, the supervisor should set up the meeting on one of the employee's scheduled workdays.

The employee's final time sheet should be submitted to the accounting office and include a minimum of two to four hours pay for the day of the meeting (this pay is not required but is included to avoid any last-minute disputes over the time to come in just to be discharged). The time sheet must be approved by the supervisor and sent to the controller with a request to prepare the employee's final paycheck. At the scheduled discharge meeting, the employee is informed of the decision to discharge, any uniforms and keys she may have in her possession are collected, and she is presented with her final paycheck.

Other Discharges. In all discharges where there has been a series of misconduct or unresolved unsatisfactory performance, the supervisor should present to the general manager the documentary evidence that the employee has been counseled, been given adequate warning, and been given reasonable time to improve.

Once the approval to discharge has been received, the supervisor will set up a meeting with the employee on his next scheduled workday and send the employee's time sheet to the controller with a request for a final paycheck. At the discharge meeting the employee will be informed of the discharge decision, any uniforms and keys will be collected, and he will be presented with his final paycheck.

Note: in both above cases, the final paycheck has been prepared and presented at the discharge meeting for the sole purpose of precluding a disgruntled employee from returning to club premises to collect a final paycheck. Another approach would be to mail the check to the employee's address of record.

Take Away: Managers and supervisor must understand the procedures for discharging an employee.



#43

Unemployment Compensation

Each state administers unemployment benefits and has regulations that affect how benefits are administered. The tax rate varies based on a specific employer's unemployment claims filed AND paid. The higher the number of unemployment claims paid, the higher the tax that will be levied against the employer's payroll. Therefore, a club's bottom line is affected by a high unemployment claim rate.

Employees have a right to file for unemployment benefits. Filing a claim for unemployment does not always mean benefits will be paid. If a former employee has lost his job through no fault of his own, he will be entitled to unemployment benefits. However, if the manager has documented progressive discipline, reasons for discharge, and responds in a timely manner to the state's notice of an unemployment claim, there is a good chance that a former employee would be disqualified from benefits.

Once an employee loses his job, an unemployment claim for benefits is filed with the state office that administers the program. The employer is notified that the former employee has filed for unemployment benefits. When a claim notice arrives, a response is important because when a claim is paid that claim could later affect the club's unemployment tax rate.

In all situations where unemployment claims notices are made, the HR manager should review the claim notice immediately to determine the validity of the claim. Notices that are received from former employees should be challenged when it can be shown that:

- There is documentation that supports a former employee had been discharged for willful misconduct or unsatisfactory work performance.
- The former employee was discharged during the introductory period (usually 90 days).
- The former employee voluntarily left employment to take a job with another company.

Documents that will support a challenge include the [Employee Separation Document, PCPM Form 117](#), [Records of Employee Counseling, PCPM Form 103](#), and [Employee Performance Reviews](#). When a claim is disqualified, it will not count against the employer's claim experience. However, if the club does not notify the state of the reasons for employment separation and unemployment benefits are paid, the claim experience will count against the future tax rate.

If an unemployment claim is granted or denied, the claim can be appealed by the losing party. A hearing usually follows where the employer can provide supporting information that would disqualify unemployment benefits.

Take Away: Managers must become familiar with their state's unemployment compensation program because it is often their actions or lack of documentation that negatively affect the outcome of an unemployment claim.



#44

Leadership

Given that [Leadership] ultimately involves guiding, influencing, and directing people, the following working definition is proposed:

Leadership is the sum of those individual traits, skills, and abilities that allow one person to commit and direct the efforts of others toward the accomplishment of a particular objective.

Central to this definition is the understanding that exercising leadership involves **building and sustaining relationships** between leader and followers. Without this bond or connection, there are no willing followers and, therefore, no true leader. Given that no leader operates in a vacuum, it also requires the leader to establish relationships with other relevant constituencies.

Discussion Points: In order to lead effectively you must be able to connect with each of your followers. You cannot build relationships without knowing your people. This does not mean you become their friend or buddy; rather it means you understand each person as an individual with unique needs and motivators.

What things can you do to better understand your employees' needs?

What part does daily communication play in getting to know your employees, understanding their needs and gaining their trust?

What can a leader do to motivate employees to work hard and excel?

How can you influence your employees to do the right things?

What behaviors do you expect in a good leader?

Take Away: You must be able to build and sustain meaningful relationships with your followers in order to lead them effectively.



#45

Good Leadership – It’s Just Common Sense

I recently read an Internet-posted news article entitled, *Disney Offers Customer Service Training*. While I found the article somewhat interesting, it was the reader comments posted below the article that caught my attention. Here they are:

1st Posted Comment: *“I work for a medical practice in Georgia that sends a few of their employees to Disney for training each year. Our patients (guests) really responded well to our new customer service guidelines. However, management really needed to attend the training as well as the regular employees. They became complacent in their ‘ivory tower’ and expected all of us to treat the patients well (and of course we did); however, **management needed to extend the same courtesy and good manners to their employees.** In the past 3 months the company has had record turnover and still harbors a large disgruntled employee pool. No idle words ... **‘Treat others the way you would want to be treated.’”***

2nd Posted Comment: *“When we returned, all 1st level management (the ones dealing with the customers) were asked to implement the Disney experience in our daily activities. **The most unfortunate part of the Disney experience was that although our senior management went along on the trip, I am yet to witness the impact it had on them when dealing with us 1st level managers.**”*

3rd Posted Comment: *“I agree with the posters who feel that **senior management should lead by example and treat their subordinates with dignity and respect. It just seems like common sense, that when employees are happy and feel-well treated, this will filter down to the way they treat the customers. Everyone in an organization deserves to be treated well and this makes for optimum performance.***

Discussion Points: Discuss the posters comments above and discuss them with your management team. Ask them what lessons are to be learned from these examples?

Take Away: Without the active involvement and example of leadership (and Service-Based Leadership at that), improvements in employee morale, dedication, empowerment, and ultimately in member service will not happen.



#46

Service-Based Leadership

With Service-Based Leadership, the attitude and primary motivation of the leader is service to others – to members, to employees, to shareholders. This approach to leadership naturally creates relationships – the deep and abiding bonds that sustain the efforts of the club. This outward focus of the leader sets up a dynamic where:

- Employees are continually recognized.
- There is an open flow of ideas, opinions, and information.
- Initiative and risk are highly regarded.
- Problem discovery and solution is a focus while placing blame is unimportant.
- Every employee feels energized and part of the team and is valued for his or her contribution.
- Prestige is derived from performance and contribution, not title or position.
- Members are treated well because employees are treated well.
- The energy and initiative of all employees is focused on the common effort.

With Service-Based Leadership, you will find that service to both internal and external customers is effortless. Less energy is expended in processing complaints, grievances, and conflicts. Work is more fun, and everyone's job is easier.

Discussion Points: Service-Based Leadership is a particularly effective style of leadership for the service industry, and this can be summed up by the following statement:

“Employees can only provide quality service if they are properly served by the leadership and example of their leaders.”

What things must leaders do to serve their employees?

Why are these things so critical to a leader's success and that of the club?

Why is a leader's example so important?

What are the consequences of not properly serving the needs of employees?

Take Away: To be an effective leader you must serve your employees by providing them the proper tools, training, resources, and daily support to do their jobs effectively.



#47

Becoming a Service-Based Leader

Successful leadership depends on the quality of relationships between a leader and followers. As such it entails relationship skills – the personal characteristics and abilities to connect with and inspire the enthusiastic efforts of a diverse group of people toward a common goal.

True leadership requires an understanding of what makes people tick – individually and in group settings. It requires sensitivity to the needs and desires of others. It requires openness and accessibility, so followers are comfortable bringing their concerns and issues to the leader. It requires a person who is self-analytical, who examines every less-than-optimum outcome for improvement, often discovering a better way to interact with followers. It requires a person who puts the needs of the enterprise ahead of personal ambition, who recognizes that tending to the group welfare in a disciplined way will ultimately bring about better performance.

Finally, learning leadership skills is not a one-time event. Just as different endeavors and levels of organizations require different skill sets for managerial success, leadership skills must expand and develop as the individual moves up to higher levels of responsibility. But the skills learned in the early years of one's career will be the foundation for the broader skills necessary when one takes on greater responsibilities, particularly if you understand that true leadership is a lifelong journey, not a destination.

Discussion Points: Discuss the following points and why they are important to becoming a Service-Based Leader.

Sensitivity to the needs and desires of others.

Openness and accessibility on the part of the leader.

Self-analytical, examining every less -than-optimum outcome.

Putting the needs of the club ahead of personal ambition.

Disciplined tending to the needs of the enterprise will bring about better performance.

Take Away: Having an outward focus on others, putting the needs of the club first, being open and accessible to constituents, and being willing to examine less-than-optimum outcomes will help you become an effective Service-Based Leader, bringing success to you and your club.



#48

The Soft Stuff

Roger Enrico, former chairman at Pepsico, famously said, “**The soft stuff is always harder than the hard stuff.**” As one who has worked in hospitality leadership roles for over thirty-five years, I would say that truer words were never spoken. In the detail and people rich environment of the hospitality business, it is the absence of well-developed “soft” skills at all levels of organizations that create our greatest challenges.

So, what are we really talking about when we speak of the soft stuff? In short, it’s the people skills – those aptitudes and abilities used to get the best out of our human assets. It encompasses all those things we talk about when discussing leadership – the highly nuanced interactions with a diverse workforce that result in motivation, morale, enthusiasm, focus, commitment, initiative, productivity, teamwork, organizational cohesiveness, and group success.

What are some very real things that you can do to improve the soft stuff at your club? Here are three basics:

- **Leadership training for all managers** to ensure they understand the absolute importance of leadership in all they do. The ongoing example and performance of your leadership team is **THE** most important driver of your club’s success.
- **Well-defined organizational values and constantly reinforced service culture** are an absolute must. Without clearly articulated values and club culture, your efforts to provide high levels of service to your membership will certainly fail.
- **Training, training, and more training** is a bedrock requirement in the club industry. There’s just too much that needs to be done right every day by everyone on your staff to leave the details to chance.

The “hard stuff” – the buildings, golf course, and other amenities are certainly important to a successful club experience. But without the soft stuff they are just expensive shells and monuments, lacking in the reassuring warmth and human touch that is at the heart of hospitality and service.

Discussion Points: Have your managers talk about some of the challenges of developing the “soft stuff” at your club. What are some specific things that could be done to improve the soft stuff so it’s not so hard?

Take Away: Develop the skills of a Service-Based Leader, create and reinforce a culture of service, and train constantly and consistently to master the “Soft Stuff.”



#49

Relationships and Leadership

John C. Maxwell, author of the bestselling *The 21 Irrefutable Laws of Leadership*, says that the definition of leadership is influence. While it is, first and foremost, the ability to influence followers, it also requires that the leader influence those people who make up any and all constituencies.

Influence is derived from the relationships you create with your followers and other constituents. How you act and interact with others is the basis for your success as a leader. The quality of your relationships will determine your outcomes. But you must understand that each of your followers and constituents is a unique individual with different needs and motivations. What may work with one may fail miserably with another. But the art of relationships can be learned. Generally speaking, while it requires experience, judgment, a measure of sensitivity to the needs of others, and a fair degree of emotional maturity, the ability to form and sustain meaningful relationships improves with age.

Developing leadership, or relationship skills, is a cumulative process. It's why Jim Collins, author of *Good to Great, Why Some Companies Make the Leap . . . and Others Don't*, proposes the Level 5 Hierarchy leading to the consummate Level 5 Leader. It is why potential leaders must be identified early, why young managers must be trained in the skills of leadership, and why such skills should be nurtured and shaped with each increase in responsibility and each step of the career ladder.

Creating and sustaining meaningful relationships is at the heart of Service-Based Leadership. The extent to which you develop those relationships early in your career will have a great bearing on your future success – but not only in your career. The bonus is that in developing Service-Based Leadership skills, you develop the skills to form meaningful relationships in other areas of your life.

Discussion Points: Discuss what it means to influence someone. What are some of the ways that your managers must influence their employees? Their boss? Other constituencies? Explain the difference in a leader's relationship with her boss, her employees, and the members of the club.

Take Away: The ability to influence others is the essence of leadership.



#50

Our Need to Serve

In his book, *Good to Great: Why Some Companies Make the Leap . . . and Others Don't*, Jim Collins says that people “want to be involved in something that just flat-out works,” but I believe it is something more. I believe that people have a great need to connect with or serve something larger than themselves. Whether it's building a skyscraper, embarking on a campaign to eradicate hunger, working on the design of an award-winning advertising campaign, or even dressing in favorite NFL team colors and attending all the home games – people need to connect to a larger purpose or endeavor.

Great leaders understand this basic human need and create that connection for their followers; but the connection I am talking about need not be a life-altering cause or event. Most of us live rather uneventful lives. While our need is to earn a living and support our families, an astute leader recognizes the opportunity to create something out-of-the-ordinary – a special enterprise that performs better than others and is a source of purpose and pride for all.

In connecting people to the challenge of creating something special, the leader feeds the employees' need to do something beyond self while advancing the purpose of the enterprise. All that is necessary is for the leader to frame the challenge in terms of shared goals. In the service industry this is a simple task. Our purpose is to serve. The quality of our service encourages membership and frequent use of the club, which in turn ensures the club's success, and, ultimately, the job security and advancement opportunities of everyone involved.

Throughout my career, I have met many eager, enthusiastic young people, some just starting out their adult lives and relishing the opportunity of their first jobs. Unfortunately for most, their youthful idealism is crushed quickly by the realities of the workplace, particularly when they are not well-led, when they are not properly trained or supported, and when they are treated as if they didn't matter.

Discussion Points: Discuss ways that your managers can fulfill peoples' need to serve. What steps could you take at your club to do this?

Take Away: Leaders should take advantage of peoples' need to serve something larger themselves by framing their mission and vision in terms of service to others – which is a natural thing to do in the club business.



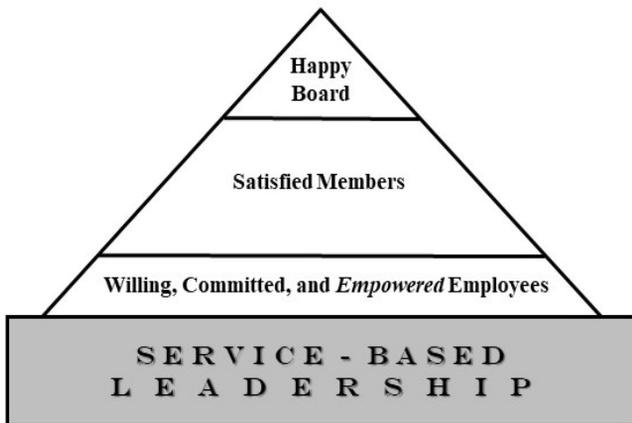
#51

The Hierarchy of Service

While Service-Based Leadership stresses that the leader must serve the needs of his or her constituencies, not all constituent needs have equal weight or importance.

The Board (representing the members) are usually the smallest constituent group in numbers, but their needs are paramount. Why? Because it is their capital that has been invested in the club and their need to operate is as a going concern that permits its continuation. If it is not profitable, if it cannot gain credit based on a potential for future profit, if it cannot meet its cash needs for payroll or to pay vendors, it will quickly go out of business and the needs of all other constituencies will become irrelevant.

Next in order of importance are the needs of **members**. Without sufficient member patronage, the club will not be viable. If not viable, all constituencies lose. Ultimately, members are attracted by price and the quality of products and services. Taken together, quality and price create a sense of value perceived by members. If enough members perceive value, they will frequent the club to spend their money and will make it successful. If not, it will ultimately fail.



The service-based organizational model depicts the importance of satisfying members, as well as the important role of employees. The organization's leaders are placed at the bottom, clearly emphasizing their role in serving the needs of all constituencies.

This statement brings us to our third constituency – **the employees**. They are the ones who execute the board's vision for quality of product and service. They are the ones whose daily interaction with members provide the necessary value. Properly led, valued, and supported, employees will enthusiastically commit to serving the club's membership thereby fostering levels of business that enable it to thrive.

Discussion Points: Discuss the relationship of the club's three primary constituencies and the priority of their needs. Discuss the relative levels of authority and influence leaders have over these constituencies.

Take Away: Service-Based Leaders serve all constituencies, but there is a hierarchy for that service.



#52

Morale Matters

Morale has always been, and will always be, an important concern to military leaders. The effectiveness of their fighting force demands it. But it is not just in armies that morale is important. Athletic coaches know that dissension, bad attitudes, and pessimism will destroy all chances for victory and work hard to build the confidence and morale of their teams. The same is true in business or any group endeavor. Morale matters!

One dictionary defines morale as “the moral or mental condition of a person or group with respect to cheerfulness, confidence, etc.”

Attitude and morale are also important ingredients in club operations where friendliness, good cheer, and enthusiasm are bedrock requirements for success. While hiring the right people with the right personal qualities has always been a safe bet when building service teams, the very act of creating teams brings its own challenges. As we have said in *Leadership and a Failure of Engagement* (the following topic), the group dynamic often creates problems that can interfere with the smooth functioning of the work team.

So how does a leader go about ensuring good morale within his or her team? First and foremost, are the requirements of Service-Based Leadership – of the need to communicate well with the team; of interacting daily with team members and providing direction; listening to and addressing their concerns; providing the tools, resources, training, and support for employees to do their jobs well. Beyond that is the need to recognize the ultimate value of people and act on that principle; to provide value to the club; to treat all employees with dignity and respect; to lead by example; to ensure closure on issues; and to be open and approachable to employees.

When all these things are done conscientiously and consistently by the leader, good morale is a natural by-product. By focusing on being the best Service-Based Leader you can be, morale and its attendant group enthusiasm and good cheer will come naturally.

Discussion Points: Discuss the impact of good and bad morale on followers. Why is this particularly crucial in the service industry?

Take Away: Leaders must always be concerned with the welfare of their followers and provide the leadership that ensures high levels of morale.



#53

Leadership and a Failure of Engagement

Most leaders readily understand the negative impact of a hostile work environment on employees. Employees who aren't properly trained, who aren't given the tools and resources to do their jobs, and who are demeaned by the abusive actions of supervisors or other employees, cannot contribute effectively to the team effort and the success of their organization.

A more subtle factor in creating a hostile work environment is the supervisor who does not engage with his team or who doesn't pay attention to what is going on in his section or department. Consider that:

- Individuals in any group setting rarely have neutral feelings toward or about the others in the group. They like some and dislike others, usually for their own, sometimes hard to discern, reasons.
- People are naturally attracted to and spend time with those they like and avoid those they don't. This results in cliques of the included and, outside the cliques, the excluded.
- The excluded often feel jealous, resentful, and fearful because of their exclusion.
- In the absence of ongoing timely and accurate information, fearful people assume the worst. Fearful people can be paranoid and perceive discrimination, favoritism, and abuse where none may exist.
- A fragmented work team cannot perform effectively.

When a supervisor does not engage daily with team members, give specific directions regarding work assignments, and communicate thoroughly about all matters affecting the team, the fragmented team will gossip, backbite, and bicker among themselves.

Seldom will they work together effectively and often their antagonisms affect customers and co-workers. Sometimes their behavior is passive-aggressive – trying to sabotage the efforts of others, all the while acting helpful and friendly.

If a manager doesn't understand this important point and fails to engage daily with all employees, he may be responsible for passively creating a hostile work environment. Such inattention to the daily functioning of the organization can be just as destructive as a supervisor who actively engages in demeaning, disparaging, and abusive behaviors.

Discussion Points: Discuss the points above with an emphasis of how a failure to engage with work teams can create a difficult and sometimes hostile work environment.

Take Away: Leaders, particularly those on the front lines, must engage with their work teams daily to ensure everyone knows their tasks and priorities.



#54

Value Your People – 1

Business consultant Susan M. Heathfield stresses the need to value your people at all times. What things can you as a leader do to demonstrate your regard for people “in all your actions and words”?

- **Know and use employee names.** Everyone likes to be recognized as an individual and called by name. Certainly, your members do, and your employees do as well. Introduce them to members and visitors when appropriate. Failing to do so implies they’re just part of the scenery instead of key contributors to the success of your operation.
- **Learn about employees as individuals.** Get to know them, their life situations, their dreams and plans, their goals in life. This does not mean you are to become their friend or confidante, but it does mean you have enough interest in them as individuals to try to understand their situation, their needs, and motivations.
- **Greet employees daily.** You should never fail to greet employees when you see them each day. You don’t like to be ignored as if you were unimportant, and neither do they.
- **Share your time with employees.** As busy as you are, make time for your employees. They have questions, concerns, and needs that should never be ignored. Be open and approachable. When you are not, when they are afraid to come to you for fear of your reaction, you are kept in the dark about what is really going on in your team. If any employee is monopolizing your time or is a “high maintenance” employee, do not be shy about letting him know the inappropriateness of this behavior.
- **Recognize each person’s strengths and weaknesses.** None of us is the perfect manager, server, retail attendant, etc. Don’t expect your employees to be. Learn each person’s strengths and weakness. Capitalize on the strengths and help each person overcome their weaknesses. The time you invest in helping an employee develop his or her skills and abilities is well worth the effort and will be appreciated far more than you’ll ever realize.
- **Be involved in the workplace and work processes.** Do not create a hostile work environment by failing to adequately engage with your employees. Without your ongoing guidance and direction, petty dissensions and friction will grow among the workers of your team as they struggle to figure out who must do what.

Discussion Points: Discuss the importance of leaders valuing their followers and other constituencies. What are some ramifications of leaders failing to value their people?

Take Away: Leaders must value their followers and demonstrate that regard in all they say and do.



Business consultant Susan M. Heathfield stresses the need to value your people at all times. What things can you as a leader do to demonstrate your regard for people “in all your actions and words”?

- **Look out for your peoples' welfare.** Make sure your employees get adequate work breaks, that their workspaces are set up for comfort and efficiency, that they are properly trained and equipped for their jobs, that you adjust work schedules, when possible, to meet individual needs, that you resolve pay discrepancies quickly, that you get back to them to resolve issues they've raised. Make sure they understand their benefits, taking the time to explain the details to them.
- **Treat employees as adults.** When you treat employees like children, they will often act like children. Don't talk down to them or treat them as if they're immature. When you give people responsibility, most will reward your trust. Those who demonstrate they can't be trusted should be encouraged to move on.
- **Show respect.** This is critically important in the way you speak, the tone of your voice, your choice of words, and your body language. Your respect for others cannot be faked. You value people sincerely to treat them with respect at all times.
- **Do not take advantage of people.** Employees are not your servants and should not be expected to perform personal services for you. If you delegate tasks, make sure there is value in it for them, either in enhanced compensation or a genuine learning opportunity.
- **Demonstrate the common decencies of human interaction in all your dealings.** Be kind and courteous. Give your people the benefit of the doubt. Don't be quick to take offense or become upset. Maintain control of your temper and reaction to events.
- **Thank employees often.** How easy is it to say, “Thank you”? It costs nothing and it reaps great rewards. The only requirement is that it must be sincerely given.
- **Say goodbye at the end of the day or shift.** A farewell is a common courtesy that you would extend to family and friends, if for no other reason than as an acknowledgement of departure. The members of your work team, who you depend on for your success, should receive no less a courtesy. Again, the need for sincerity is absolute.

Discussion Points: Discuss the importance of leaders valuing their followers and other constituencies. What are some ramifications of leaders failing to value their people?

Take Away: Leaders must value their followers and demonstrate that regard in all they say and do.



#56

Give Them More Than Just a Paycheck

Throughout my career I've too often heard managers complain about the labor pool, the lack of work ethic and sense of responsibility among workers, and the constant headaches that came from their human "resources." The overwhelming sense from these managers was, "We pay too much to these people whose only interest is in collecting a paycheck."

Yet at the same time and in the same or similar markets, there were other managers who did just fine in finding and retaining good people who made a real contribution to their clubs. What then made the difference? The answer is quite simple – good leadership! So instead of just providing your employees with a paycheck, consider giving them the following:

Respect. The life of all human beings is important to themselves, yet too many people are treated by their bosses as if they didn't matter. This maltreatment is not always by design; it's the byproduct of busy bosses too focused on themselves or the many problems they face in busy operations. But every employee deserves to be treated with the utmost respect and the common courtesies of human interaction. When consistently and sincerely given, this respect will transform any work team.

Responsibility. Placing responsibility on your work team demonstrates your trust in them. Trust given returns trust. In contrast, when you treat your employees like idiots or children, many will respond by acting like idiots or children.

Recognition. Every day your employees do hundreds of things right. Make sure you recognize that essential contribution to the success of your operation. When sincerely given, a simple thank you or handshake of appreciation has a profound impact on morale, commitment, and contribution.

Responsiveness. Leaders must engage with their employees every day and respond to their issues and concerns. In any group of people working in a complex, fast-paced, and detail-intensive business there will be conflict and turmoil. Without the leader's guiding hand, this turmoil can consume the operation. Leaders must stay engaged, be approachable, and respond to concerns.

Example. Someone once said, "A leader leads by example, whether he intends to or not." The leader's example is paramount in setting the standards of the operation. If the leader doesn't seem to care about her employees, they won't care about her or her initiatives and agenda.

Training. Most people want to do a good job and appreciate when they are properly trained to improve their knowledge, skills, and job performance. Lack of training leads to a chaotic and confusing work environment, the loss of conscientious employees, and a staff dominated by people who "couldn't care less."

Removal of Roadblocks. Leaders should be hyper-sensitive to anything in the workplace that inhibits efficiency. Do whatever is necessary within reason to identify and eliminate anything that makes employees' jobs more challenging, time consuming, and frustrating. Not only do you gain speed, efficiency, and improved productivity, but your employees will understand that you are dedicated to improving the operation and you care enough about them to address legitimate concerns.

Discussion Points: All of the above steps from leaders will have a dramatic effect on employees and the operation. In contrast, when you give your employees no more than a paycheck, you shortchange them, the club, and your members.



The 100/0 Principle

Al Ritter has written a great little book, *The 100/0 Principle*, subtitled *The Secret of Great Relationships*. While this may sound like any one of the score of self-help books published annually, one merely has to look at Mr. Ritter's resume – MBA from Dartmouth, marketing and operations positions with Pepsico, CFO at Swift and Company, Senior VP for Citigroup, consulting for Accenture, and founding his own consulting company – to recognize that this short, simple, and easy-to-read book holds much promise for business leaders in any setting and level of organizational hierarchies.

I believe the simple concept at the heart of this book is arguably the single most important guarantor of success in any relationship, certainly in the personal arena, but beyond that in any organization or business enterprise. Such well-known leadership authors as John C. Maxwell, Brian Tracy, and Warren Blank have all recognized the central role of relationships in any attempt to lead. As Maxwell said, "People who are unable to build solid, lasting relationships will soon discover that they are unable to sustain long, effective leadership."

What Mr. Ritter so strikingly advocates in his book is that if you want any relationship to be successful, you must take 100% responsibility for the outcome while expecting nothing in return. While this statement may seem shocking to some, I believe it is counter-intuitive wisdom of the highest order. To examine why, consider the following statements relating to leadership:

- A leader is responsible for her own success.
- A leader is responsible for everything his organization does or fails to do.
- In a free society, all but the most socially or economically disadvantaged followers have choice and can go elsewhere.
- Meaningful relationships are based on trust.
- Followers don't automatically extend their trust to a leader; it must be earned.
- As the one with the power and authority, the leader must take responsibility for establishing trust.
- If, for whatever reason, a relationship with followers is not going well, a leader cannot expect or wait for others to fix it.
- Therefore, he or she must take full responsibility for the relationship.

Discussion Points: Discuss the points above and how they lead inescapably to the conclusion that a leader is 100% responsible for the relationship with followers and how they respond to his leadership.

Take Away: The only person responsible for successful relationships with followers is the leader.



#58

Your Example

Albert Einstein said, “Setting an example is not the main means of influencing another, it is the only means.”

Always keep in mind the consequences of your behavior as a leader:

- If you are not loyal to your employees, they will not be loyal to you.
- If you do not respect your employees, they will respond in kind.
- If you don’t care about your employees, they won’t care about you or your endeavors.
- If you don’t look out for their interests, they won’t look out for yours.
- If you don’t treat your employees with respect, they will not treat you or your members with respect.
- If you are abusive to employees, the good ones will leave; only the poor ones will stay.
- Service is all about attitude; treating employees badly fosters bad attitudes.

Your example sets the standard for all your employees. Don’t blame them if they don’t have high standards.

Discussion Points: Discuss how a leader’s example influences the actions of followers for good or bad. Encourage your managers to give anecdotes from personal experience.

Take Away: “A leader leads by example, whether he intends to or not.” *Anonymous*



#59

Record of Employee Counseling, FM-103

Teachable Moments

Private Club Performance Management Record of Employee Counseling

Name: _____ Date: _____

Department: _____ Supervisor: _____

Counseling Disciplinary Action **FOR:** Conduct Work Performance

Date/Time of specific actions or omissions listed below:

Subject (discuss specific actions or omissions in detail):

(Continue on blank sheet, if necessary)

Employee's Comments:

(Continue on blank sheet, if necessary)

Proscribed Corrective Actions:

(Continue on blank sheet, if necessary)

Time Allowed for Corrective Action(s):

Written Notice First Written Warning Final Written Warning

Further disciplinary action, including discharge will be taken if corrections are not made within time allowed.

Employee's Signature	Date	Supervisor's Signature	Date

Distribution: Original to personnel file
 Copy to supervisor's file
 Copy to employee

Management Review	Date



#60

Applicant Reference Check, FM-108

Private Club Performance Management

Applicant Reference Check

Applicant Name: _____	Psn Applied/Considered For: _____
Department: _____	Supervisor: _____
Psn Employment Status:	<input type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input type="checkbox"/> Seasonal

Name/Company of Reference: _____	<input type="checkbox"/> By Phone <input type="checkbox"/> By Letter
Position Held: _____	Dates of Employment: _____
Final Pay Rate: _____	Would Rehire? <input type="checkbox"/> Yes <input type="checkbox"/> No
Other Comments: _____	

(Continue on blank sheet, if necessary)	

Name/Company of Reference: _____	<input type="checkbox"/> By Phone <input type="checkbox"/> By Letter
Position Held: _____	Dates of Employment: _____
Final Pay Rate: _____	Would Rehire? <input type="checkbox"/> Yes <input type="checkbox"/> No
Other Comments: _____	

(Continue on blank sheet, if necessary)	

Name/Company of Reference: _____	<input type="checkbox"/> By Phone <input type="checkbox"/> By Letter
Position Held: _____	Dates of Employment: _____
Final Pay Rate: _____	Would Rehire? <input type="checkbox"/> Yes <input type="checkbox"/> No
Other Comments: _____	

(Continue on blank sheet, if necessary)	

Supervisor's Signature	Date

Teachable Moments



#61

Employee Development Plan, FM-116

Club Resources International

Employee Development Plan

Name:	Department(s):
Job Title:	Supervisor:
Development Period: From:	To:
The Employee Development Plan is used to communicate the necessary steps to improve unsatisfactory performance. The plan provides a clear statement of the problem, the steps necessary for improvement, and a time frame to demonstrate the improvements. Lastly, it establishes the frequency of and dates of intermediate reviews to determine progress toward the overall improvement.	
1. Statement of Problem:	
Specifics Steps to Improve:	
Time frame to demonstrate improvement:	
2. Statement of Problem:	
Specifics Steps to Improve:	
Time frame to demonstrate improvement:	
3. Statement of Problem:	
Specifics Steps to Improve:	
Time frame to demonstrate improvement:	
Frequency of intermediate reviews:	
Dates of reviews:	
Supervisor's Signature:	Date:
Employee acknowledges that he/she has received this development plan, understands it, and is prepared to work towards making the improvements noted.	
Employee's Signature:	Date:

Teachable Moments



#62

Employee Separation Document, FM-117

Private Club Performance Management

Employee Separation Document

Employee Name:	Today's Date:
Department:	Effective Date of Separation:
Job Title:	Position # (if FT or PT):
Reason for Separation: <input type="checkbox"/> Voluntarily Quit <input type="checkbox"/> Discharged <input type="checkbox"/> Layoff/Reduction of Hrs <input type="checkbox"/> Abandonment <input type="checkbox"/> Retired	
Explain:	
Would you rehire? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Explain:	
If the Separation was a Voluntary Quit or Abandonment	
1. Was notice of the quit given? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, how far in advance of the quit?	
2. What reason was given for the quit?	
3. Would a leave of absence have been available for health, domestic problems, other emergencies? <input type="checkbox"/> Yes <input type="checkbox"/> No	
4. Was the quit in anticipation of future discharge? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, describe circumstances:	
5. Was the quit in anticipation of other employment <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, describe other employment	
If the Separation was a Discharge:	
1. What was the final incident which caused discharge? Attach Record of Disciplinary Action	
2. Was a warning issued prior to the discharge? <input type="checkbox"/> Yes <input type="checkbox"/> No For same offense which caused discharge? <input type="checkbox"/> Yes <input type="checkbox"/> No	
How recently?	Attach Record of Disciplinary Action describing warning incident
3. Were there witnesses to the final incident? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, who?	
4. Was there a violation of a known Company policy? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, describe policy:	
5. What reason(s) were given for the discharge?	
Supervisor's Signature:	Date:
HR Manager's Signature:	Date:
GM's Signature:	Date:

Teachable Moments



#63

Employee Handbook Acknowledgement, FM-118

Teachable Moments

Private Club Performance Management

Employee Handbook
Acknowledgement & Disclaimer

Employee Name:	Today's Date:
Department	

ACKNOWLEDGEMENT

Upon receipt of your Employee Handbook, please read the following, sign and date in the indicated spaces below and return this page to your supervisor or personnel administrator.

- I have received the Employee Handbook and understand the importance of the information it contains.
- I acknowledge that it is my responsibility to read and understand the information and policies contained in this handbook.
- I also understand that if I have any questions regarding material in this handbook, I should seek clarification from my supervisor.
- I have read, reviewed and understand the Club's Policy on Harassment. I further acknowledge that it is my responsibility if I feel I have been subjected to verbal, physical, or sexual harassment to immediately notify my supervisor, or alternatively, to notify the General Manager to allow an investigation to proceed. I understand that my legal rights depend on my promptly notifying my supervisor or club manager of any type of harassment, and to fully cooperate in any investigation.
- I have read and understand the Club's Alcohol and Drug Policy, and that in addition to this acknowledgement, I will be asked to sign an additional document entitled "Alcohol & Drug Testing Authorization." I understand and agree that violation of the Alcohol and Drug Policy may result in testing and that any future employment may be contingent upon successful completion of any alcohol and /or blood tests.
- I have read and understand the Club's Electronic Communication System Policy, and understand I have no expectation of privacy regarding any information on the Club's phone, radio or computer systems.

DISCLAIMERS

- I understand that the information provided me in this handbook should not be considered, and does not imply in any way, an employment contract between myself and the Club.
- **I FURTHER UNDERSTAND THAT IN THE ABSENCE OF A SIGNED EMPLOYMENT AGREEMENT THE EMPLOYMENT RELATIONSHIP BETWEEN THE CLUB AND ME IS "AT WILL" AND MAY BE TERMINATED BY MYSELF OR THE CLUB AT ANY TIME AND FOR ANY REASON.**
- I understand that no one, excepting the President of the Club, can enter into any employment agreement with an employee.
- I understand that the information contained in the Employee Handbook is subject to change at any time, unilaterally by the Club at its sole discretion.

(After completing this form and signing below, return it to your supervisor.)

Employee's Signature:	Date:
-----------------------	-------



#64

Employee / Departmental Goals, FM-135

Private Club Performance Management

Employee/Departmental Goals

Name:	Department:
Job Title:	Supervisor:
Period: From:	To:

The Employee/Departmental Goals sheet is used to establish clear goals for an employee or club department. The goals must be determined by the employee in conjunction with his or her supervisor. Goals are listed in order of priority. Each goal should have an expected completion date, mutually agreed upon by employee and supervisor. The sheet also allows the employee and supervisor to establish dates to review progress toward completion of the goals.

Goal #1:	Expected Completion Date:
Discussion:	
Goal #2:	Expected Completion Date:
Discussion:	
Goal #3:	Expected Completion Date:
Discussion:	
Goal #4:	Expected Completion Date:
Discussion:	
Goal #5:	Expected Completion Date:
Discussion:	
Goal #6:	Expected Completion Date:
Discussion:	

Dates of intermediate reviews:

Supervisor's Signature:	Date:
Employee's Signature:	Date:

Teachable Moments



#65

Action Planning Sheet, FM-136

Private Club Performance Management

Action Planning Sheet

Name:	Department:
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Job Title:	Supervisor:
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Period: From:	To:
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The Action Planning Sheet allows employees and supervisors to more fully develop plans to accomplish assigned goals. The sheet allows each goal to be broken down into its component steps with an expected completion date for each. This is particularly helpful for complex goals with multiple steps or the input and action of other individuals.

Goal:	Expected Completion Date:
-------	---------------------------

Action Step #1:	Expected Completion Date:
-----------------	---------------------------

Action Step #2:	Expected Completion Date:
-----------------	---------------------------

Action Step #3:	Expected Completion Date:
-----------------	---------------------------

Action Step #4:	Expected Completion Date:
-----------------	---------------------------

Action Step #5:	Expected Completion Date:
-----------------	---------------------------

Action Step #6:	Expected Completion Date:
-----------------	---------------------------

Dates of intermediate reviews:

Supervisor's Signature:	Date:
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Employee's Signature:	Date:
-----------------------	-------

Teachable Moments



Additional Resources

To further assist you in your quest for quality and service we offer additional resources available on the PCPM Marketplace store:

[Leadership on the Go](#) – 54 topics that can be used for discussions at staff meetings, as reading for managers, or to explain the club's leadership style to newly hired managers and supervisors. The perfect tool for teaching a consistent, service-based style of leadership.

[Values on the Go](#) – A proven training tool to constantly and consistently remind your management team of the club's underlying values. These 58 values topics in a wire-bound book can be used for discussions at staff meetings, as reading for managers, or to explain the club's values to newly hired managers and supervisors. Includes topics on Mission, Vision, Guiding Principles, and Operating Standards.

[Human Resources on the Go](#) – 76 topics covering key labor laws, human resource best practices, and training to formalize a consistent understanding of this critical aspect of club organization that is fraught with legal and liability issues if not conscientiously and uniformly applied. A perfect tool to bring you management team up-to-speed on these important issues.

[Food Service Management on the Go](#) – Another On the Go Training tool in a spiral-bound book containing 138 best practice topics to remind and reinforce the necessary disciplines in running a high-quality and high-performing food service operation. In addition to well-known practices, this collection contains a variety of innovative ideas to improve and transform the most challenging part of your club operation.

[Service on the Go](#) – The 57 topics in the Service on the Go book cover such topics as The Foundation of Service, Principles of Service, Attitude, Basic Service Issues, Teamwork, Club Etiquette, Common Courtesies, Appropriate and Inappropriate Language and Phrases, Body Language and Tone of Voice, The Challenges of Food Service, The Pre-Shift Meeting, Suggestive Selling, Engaging Members, Dining Service Tips, Service Recovery, Wow Factors, and more.

[General Food and Beverage Knowledge Training Manual](#) – A 44-page training manual that familiarizes servers with basic and common food and beverage terms. This knowledge will make your servers more confident in dealing with members and guests. Perfect for self-study or group led instruction. Formatted in MS-Word to allow easy customization.

[Alcoholic Beverages on the Go](#) – 136 training topics covering beer, wine, and spirits to help train your servers to suggest and upsell.

[The Power of Employee Empowerment](#) – This 27-page wire-bound guidebook explains the concept of employee empowerment and what it takes to achieve it. A great training tool for managers at all levels and a perfect complement to Service-Based Leadership training.

About the Author

Ed Rehkopf is a graduate of the U.S. Military Academy and received a Masters of Professional Studies degree in Hospitality Management from Cornell's School of Hotel Administration. During his long and varied career, he has managed two historic, university-owned hotels, managed at a four-star desert resort, directed operations for a regional hotel chain, opened two golf and country clubs, worked in golf course development, and launched a portal web site for the club industry.