



**Private Club  
Performance Management**

# **Expectations, Work Planning & Performance Reviews**



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## Performance Management

Recognizing that a private club is a collection of diverse business enterprises, each with its own requirements, disciplines, and knowledge for success, general managers must rely on department heads to run their operations with high levels of professionalism, efficiency, and service. But to ensure that this is consistently done with a quality that meets members' and the board's expectations, the general manager must exert his or her authority to guide subordinates toward a common vision, specific goals, and a coordinated timing of initiatives across departmental lines.

There is probably no more important thing a general manager can do to drive desired outcomes than to prepare detailed work plans for subordinate managers and hold them strictly accountable for results.

But beyond the specifics and timing of work plan elements, the general manager must also spell out in detail his or her expectations for leadership, management disciplines, and organizational professionalism, as well as performance and service standards for the operation. The overall cycle of **performance management**, then, consists of spelling out expectations, driving organizational development through work planning, and providing feedback and measurements of performance by means of periodic formal reviews.

The performance of line employees, while not carrying the same scope and weight of consequence as that of managers and supervisors, is still important in that it most directly affects member service and service delivery. So, while the work planning requirement is not as significant for line employees, the need to spell out expectations for behavior and performance is still of major concern.

Further, all employees need and deserve feedback on their efforts at work. Such feedback serves as ongoing guidance as to the suitability and sufficiency of their contribution to the collective effort. While it is expected that employees will receive this feedback on a day-in, day-out basis, it is also customary and appropriate to give them formal feedback during periodic performance reviews.

Lastly, such reviews provide opportunities for helping employees with self- and career-development advice. Such interest by management in each employee's development will yield greater commitment and loyalty to the organization and its performance.

# EXPECTATIONS

The articles in this section are designed to provide management and supervisory staff with the basic standards by which their efforts will be judged.



## Expectations

Unless your employees inhabit some alternate reality, one in which everyone intrinsically understands the multi-dimensional requirements of service and has telepathic powers to know how you want them to function at all times, you as a general manager must spell out your expectations for them.

This is particularly so for your management team. Regardless of background, education, and work experience, you must ensure that they know what you expect of them in all situations. Further, to ensure consistency in the operation and how employees interact with members, managers must have a common understanding of your club's standards, policies, and procedures. This means that you must communicate in detail your expectations for the following:

- Leadership
- How members and employees are valued and treated
- Organizational values
- Organizational culture and service standards
- Club and departmental organization
- Operational disciplines
- Training, and
- Performance

Without making the effort to define expectations in these critical areas, the enterprise will operate as a collection of tribes, each reflecting the dedication, performance, and example of its manager. Such an operation will be disorganized and conflicted – incapable of rendering consistent service and value to its members.

Any general manager with any length of experience and time to reflect upon the realities of our industry will know this to be true, yet who has the time to spell out such a large, complex, and interconnected set of expectations while dealing with the day-in, day-out challenges of a busy club operation?

It is for this reason that, at the culmination of a long career in hotels, resorts, and private clubs, I have attempted to define the expectations for those who report to me. While these expectations reflect my approach to leadership and management and may not apply in every case, I believe they offer a large number of proven best practices for any manager who wishes to develop employees to their fullest potential and provide high levels of service to customers.

See [\*What I Expect from My Club Management Team\*](#) for greater detail.



## A Modest Grand Theory

Albert Einstein, after his world-shaking General Theory of Relativity was published, validated, and accepted by the scientific community, spent the remainder of his life working on a Unified Field Theory that attempted to boil all physics down to one elemental formula, hopefully as elegantly simple as his earlier stroke of genius,  $E=mc^2$ . While he never achieved his Grand Theory, I fully understand his desire to distill complexity to simplicity.

On a far humbler scale, I have also been impelled to boil down the seeming complexities of club operations into a smaller number of principles that when followed would lead to organizational success. What I've come to believe is that there are five basic requirements for any successful organizations. They are:

1. **Leadership** – the skills that permit those who direct the club to win the enthusiastic support and efforts of their employees to the accomplishment of specific goals and tasks.
2. **Culture** – the well-defined and consistently reinforced values that underpin the efforts of the club.
3. **Organization** – the ability to structure and integrate the complex and interrelated processes and programs of the club to promote efficient operations.
4. **Management Disciplines** – the ability to consistently implement generally-accepted requirements and best practices at all levels of the club.
5. **Hiring Well and Training Thoroughly** – the programs and disciplines that cultivate the attraction and retention of the best talent, as well as consistent, efficient, and professional completion of all tasks and engagements with members.

Having outlined these requirements, I would go on to say that they are all supported by one underlying element and that is **DISCIPLINE**.

While complex business enterprises require both broad and specific skill sets for success, these mean little if each individual and the management group as a whole don't have the intense and overriding discipline to focus daily on the essential tasks at hand and complete them as efficiently as possible.

Complex enterprises may be based on sound management ideas and theory, but without, as Jim Collins says, "disciplined people taking disciplined thought and engaged in disciplined action," they will never build enduring greatness. In other words, despite whatever talents your management team may possess, without discipline you're just muddling through.

In club management it's all about discipline, discipline, discipline. Experience shows that discipline can be taught by **setting challenging requirements for subordinates, and then holding them strictly accountable for results**. They will either become disciplined or will move on by their own choice or yours.



## Eight Steps to Performance Accountability

The greatest failure in performance management in any enterprise is the failure to hold managers accountable for their performance. Many club operations do a poor job in the area of accountability. This failure is crippling to the long-term health and viability of the club. Here are eight steps to help measure performance and hold managers accountable:

1. **Work Plans.** Within the overarching guidance of the Annual Club Plan and specific direction from the general manager, have each department head prepare an annual work plan spelling out goals, proposed accomplishments, and timelines for completion of each item. While their buy-in is important to their commitment to their individual plans, ultimately plans must meet the needs and desires of the board and general manager.
2. **Budgets.** For managers of profit or cost centers to be held accountable for meeting budgets, they must participate in developing their own budgets. An unrealistic budget will defeat a manager from the get-go, but “softball” budgets cannot be accepted either. One of the best ways to budget is prepare Zero-Based Budgets by using volume and average sale/hourly wage benchmarks to build the revenue and payroll components of the budget. Not only do historical metrics make for more accurate budgets, but also Real Time Accounting and analyzing these underlying benchmarks on an ongoing basis makes for a better understanding of shortfalls in revenue or overages in payroll costs.
3. **Benchmarks.** All departments must be benchmarked in detail – at minimum revenues, cost of goods, payroll, and other operating expenses should be benchmarked monthly. These and other benchmarks are the most objective measures for holding managers accountable.
4. **Tools to Beat Budget.** Use the Tools to Beat Budget program (a practical tool for Real Time Accounting) whereby all managers with bottom line responsibility track their revenues and expenses in real time, thereby exercising greater control over their budget and financial performance. Properly maintaining the Tools to Beat Budget binder provides all the information necessary for in-depth monthly reviews of performance by the general manager and other interested parties, while making future budgeting much easier and more accurate.
5. **Monthly Review Meetings.** Hold monthly meetings with individual department heads to review progress on annual plans, actual to budget performance, benchmarks, and efforts to correct operational and performance deficiencies. These meetings permit ongoing review and course corrections or added emphasis as necessary.
6. **Routine Departmental Inspections.** Use routine inspections with a standardized checklist to inspect all operating areas on an ongoing basis. Such inspections should monitor and note cleanliness, order, maintenance, safety, security, and other signs of organized and efficient operations. These inspections when standardized, scored, and benchmarked provide an ongoing measure of these basics of an operation.
7. **Interdepartmental Support Evaluations.** Since all departments of an operation are interrelated and depend upon one another for peak performance, each department head should fill out standardized evaluations on interdepartmental support and cooperation. As an example: the accounting department will have a hard time meeting its requirements if operating departments do not submit coded invoices, payroll data, inventories, benchmarks, and other financial data in a timely fashion. If department heads know that





their performance in these areas is being monitored and rated, they will put greater emphasis in meeting these requirements.

8. **Performance Reviews.** Base periodic performance reviews for each manager on specific accomplishments and meeting well-defined performance measures. Meaningful reviews are directly dependent upon the effort put into defining expectations, establishing specific work plans, and creating objective measures for accomplishment and performance. While it takes some thought and effort to set up a system of objective measures, the rewards for doing so are immense and well worth the effort.

Unless general managers do everything themselves, they must rely on the efforts and performance of subordinate managers. But without measurable accountabilities they have no real means to drive their agendas, performance, and other initiatives to improve operations.

*When department heads aren't held accountable, only the General Manager will be.*



## The Three Cycles of Performance Management

BusinessDictionary.com defines Operational Performance Management (OPM) as *“the alignment of the various business units within a company in order to ensure that the units are helping the company achieve a centralized set of goals. This is done by **reviewing** and **optimizing** the operations of the business units.”*

In club operations this means that each department, or business unit, has a common understanding of purpose, methods, and means in meeting the mission and vision of the organization. These business units are broken down into two distinct categories:

- **Line Departments** – those who directly serve the members by providing them with products and services. These departments include golf, food & beverage, golf course maintenance, membership, locker rooms, retail, activities, fitness and spa, aquatics, tennis, and others depending upon the amenities offered.
- **Support Departments** – those that indirectly serve members by serving the needs of the line departments. They include human resources, accounting, facilities maintenance, housekeeping, laundry, groundskeeping, and administration. These departments fulfill the important function indicated by Aldi grocery chain founder Karl Albrecht when he said, “If you’re not serving the customer, you better be serving someone who is.”

Since every department has its own manager or director with the distinct expertise and skill set to succeed in his or her enterprise, the general manager has the challenge and opportunity to direct these disparate business units to achieve the centralized set of goals. To achieve this alignment or unity of effort the general manager must paint a clear vision of how the organization will perform and interact with members. She must also define and continually reinforce organizational values and culture, while providing clear expectations for each department’s performance.

Without this effort to clarify, unify, and integrate departmental operations, the club operates as separate businesses, each with its own standards and each interacting with members according to the dictates and example of its department head. This then is where the general manager has the major task of optimizing and reviewing the ongoing operations of the business units. If not properly organized and made routine this process of review and optimization can consume a lot of time and effort for an already busy executive whose principal focus is on board, member relations, and strategic direction.

So, what can be done to better organize the sizable and clearly important task of performance management? As always when confronted with a large and complex task, the first step is to identify, synthesize, and simplify the essential elements of the challenge. In doing so we believe there are three essential elements to achieve the necessary unity of purpose. They are:

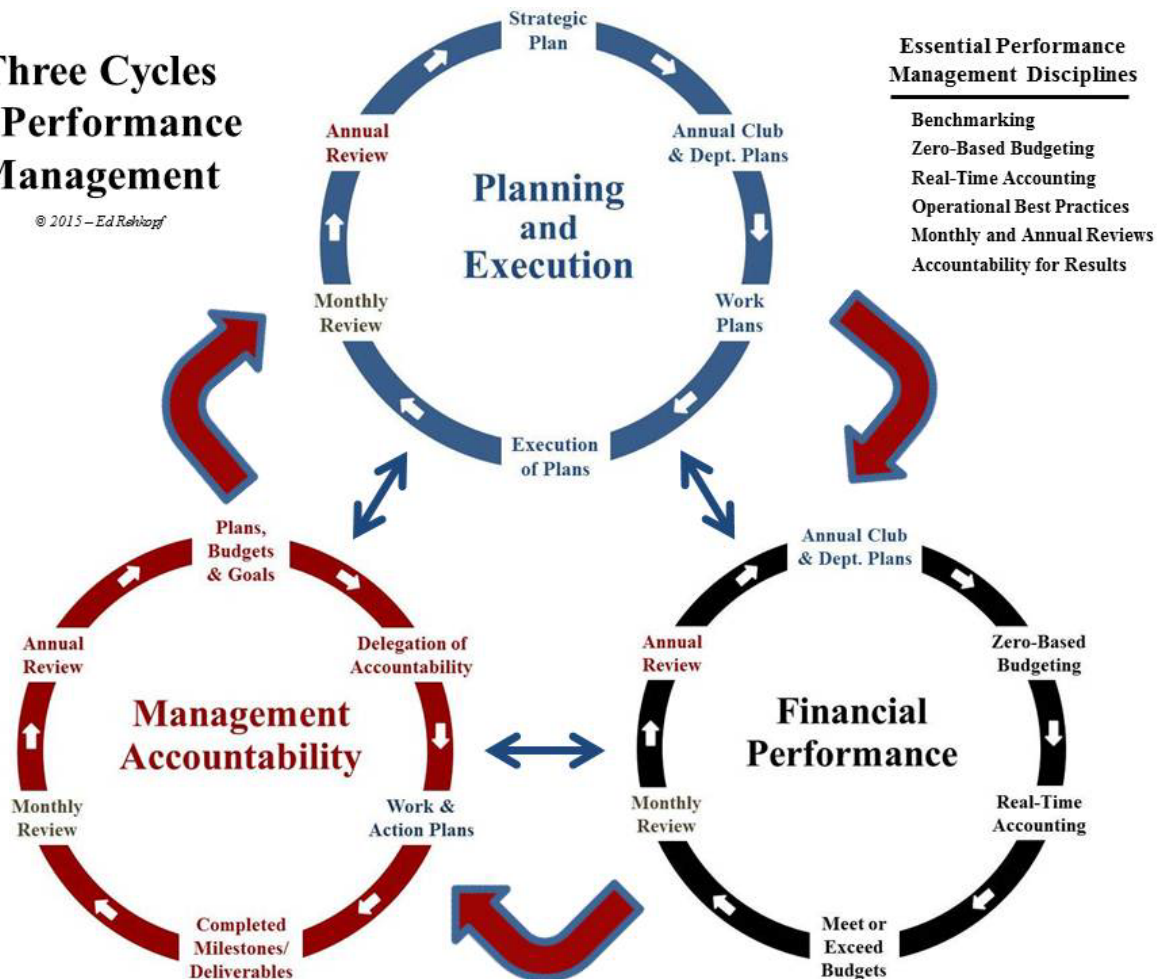
1. Planning and Execution,
2. Financial Performance, and
3. Management Accountability.

Each of the requirements encompasses a cycle of steps that provide the necessary preparation and operational execution to achieve the necessary alignment. See the Three Cycles of Performance Management infographic below for more information.



## Three Cycles of Performance Management

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Many elements of the three cycles are interdependent, and in some cases identical. The following briefly describes each cycle:

### Planning and Execution (P&E)

- The Planning and Execution cycle is the logical starting point in that the efforts of all three cycles are dependent on the club's multi-year Strategic Plan.
- The second element of the P&E cycle – the Annual Club and Departmental Plans – is also the starting point for the Financial Performance (FP) cycle.
- Next in the sequence are individual Work and Action Plans for the general manager and department heads. These specify goals and necessary steps, including timetables and deliverables, for each goal.
- Throughout the year all managers work toward completion or Execution of Plans.
- Each month after the financial statement is distributed, the general manager holds a series of meetings with individual department heads to review financial performance, benchmarks, and work/action plan progress.



- Finally, the Annual Review for each department head formally summarizes each department head's execution of his or her respective annual plans.

### **Financial Performance (FP)**

- The Financial Performance cycle starts with the approved Annual Club and Departmental Plans since budgets are usually affected by plans.
- Zero-Based Budgeting is the next step and is distinct from the common practice of taking last year's operating results and adding a percentage inflationary increase, thereby incorporating last year's operating inefficiencies and plan requirements into the financial plan for the coming year. This problem merely compounds erroneous and often "fat" budgets year after year.

The concept of zero-based budgeting calls for each year's budget to be built from scratch based on the coming year's annual plan. This seemingly challenging requirement can be greatly simplified by using revenue and payroll projections based on two sets of variables – the number of sales transactions and average revenue per transaction and the number of payroll hours and the average hourly wage (for non-exempt employees) respectively. These key drivers of revenue and payroll cost are easy to obtain if the department head has properly benchmarked his operation during the most recent year.

- Next in the FP cycle is Real-Time Accounting which allows the department head to closely monitor performance in real time thereby providing ample opportunity to intervene to Meet or Exceed Budget – the goal of every department head in executing their budgets.
- Next is the same process for Monthly and Annual Review as described under Planning and Execution above.

### **Management Accountability (MA)**

- Finally, is Management Accountability. In completing the other two cycles, the general manager has defined planning and financial expectations for each department head, plus any expectations for personal, professional, and departmental improvements.
- The next step is a clear explanation of the department head's strict accountability for enterprise performance. While this step seems so basic many would argue it hardly needs saying, experience throughout a long career leads me to believe that while everybody says they embrace it, few actually do – mostly because they don't have the method or means to hold subordinates accountable.
- The Work and Action Plans step is as described in the Planning and Execution cycle above.
- Completion of Milestones and Deliverables encompasses all the requirements of accomplishment and timing laid out in work and action plans.
- Once again, the Monthly Review provides a formal structure of review to ensure compliance with or completion of all plans, month by month as the year progresses – all with the aim of eliminating surprises at year's end.
- Lastly, the Annual Review formally summarizes the performance of each department head in meeting all performance goals and objectives.



### **Essential Performance Management Disciplines**

There are a number of factors that contribute to successful performance management. First and foremost, as usual, is [Service-Based Leadership](#) with its emphasis on open and thorough communication. Beyond that are a handful of specific management disciplines that are clearly essential to the process:

- **[Benchmarking](#)**. The act of measuring and analyzing key performance indicators is critical. Without the ability to accurately forecast and monitor performance, there is no hope of controlling operating performance. Benchmarks are also indispensable in establishing accurate zero-based budgets.
- **[Zero-Based Budgeting](#)**. As explained above the need to create baseline budgets each year based on Annual Club and Departmental plans is an essential contributor to a realistic financial plan.
- **[Real-Time Accounting](#)**. Club operations are detail-intensive and often fast paced. Without daily analysis of results during the ongoing rush of business, there little hope of meeting or exceeding budgets.
- **[Operational Best Practices](#)**. All departments must continually optimize their operating performance by utilizing the wide range of management disciplines and best practices. There is so much to be done every day in busy operations it's all too easy to take one's eye off the ball. Ongoing focus on operating efficiency is a major concern and benchmarks often provide valuable feedback on progress.
- **Monthly and Annual Review**. Referring to the definition of performance management in the opening paragraph, ongoing review of operations, including key performance indicators, budget compliance, and plan milestones and deliverables, is vital to success. The establishment of regular and routine meetings with individual department heads for this purpose will keep everyone on track to meet performance objectives.

As with any cycle, the end comes back to the beginning and the process of planning, budgeting, and establishing management accountability begins anew. With each passing year the discipline gained, and performance achieved will more deeply imprint performance management in the club's DNA – and shouldn't that be a key expectation for the management team?



## **A Musical Analogy**

An orchestra is made up of many individuals accomplished in their chosen instruments. Through discipline, hard work, and long practice each musician has mastered the many-faceted intricacies of instrument, musical notation, and both solo and group performance. Individually they are musical professionals, yet to be hired by a reputable orchestra they must prove not only their instrumental prowess, but also their skill and temperament to play in a larger group under the direction of the orchestra's conductor.

A club organization is typically an organization composed of a half dozen or more business specialties, each requiring managers of proven performance in their individual fields. Not only must they demonstrate the knowledge, expertise, and disciplines of their vocations – accounting, sales and marketing, food service, facility maintenance, housekeeping, retail management, recreation operations, golf management, agronomics, and human resources – but they must also work well together as a team of professionals dedicated to a common purpose under the direction of the general manager.

In preparing for the concert season the conductor must lay out her proposed program of concerts, the individual pieces selected for play, and her unique vision of how each piece is to be played – the orchestral composition, the musical arrangement, the style of play, and selection of solo performers, and other factors – and then rehearse the orchestra to achieve the desired performance. Despite the accomplishments of individual musicians, the orchestra will never achieve critical acclaim, renown, and success without this unifying effort.

The general manager of a club operation has a similar role to play. Despite the qualifications of each department head, despite the specific knowledge of their chosen professions, without the direction and guidance of the general manager, the multiple businesses will not perform in an integrated, professional, and successful manner.

To achieve this unity of effort the general manager must paint a clear vision of how the organization will perform and how it will interact with members. He or she must also define and continually reinforce [organizational values and culture of service](#), while providing clear expectations for each department's performance. Without this effort to clarify, unify, and integrate departmental operations, the club operates as separate businesses, each with its own standards and each interacting with members according to the dictates and example of its department head.

After nearly forty years in the hospitality and club industries, I am clearly convinced that the greatest mistake too many general managers make, particularly in small, standalone properties, is to get too involved in daily operations. It's a mistake I made all too often in my career. Instead of guiding, instructing, and coaching department heads to run their operations like their own businesses, instead of spelling out my expectations, creating meaningful work plans based on measurable accountabilities, and then holding them strictly accountable for results, I spent too much time taking the initiative and solving problems myself. Not only did this mire my efforts in operational problems when I should have been charting the strategic course of the business, but it also robbed conscientious department heads of their initiative and sense of responsibility for their operations.





## **The Proper Role of General Managers in Club Operations**

General managers of club operations wear a lot of hats and tend to be involved in many ongoing day-to-day operational activities and issues. This involvement seems to flow from various organizational deficiencies:

- Department heads need a lot of guidance to properly run their departments. The GM must get involved because a subordinate manager created problems or lacks a comprehensive vision for the operation. This is usually a direct result of poor training and leadership development.
- The organization of work is inadequate or inefficient, requiring frequent GM interventions. This is a result of a lack of or poorly implemented operating systems and training of subordinate managers.
- The GM gets involved in responding to complaints about poor service. This is usually a result of inadequate staff training for which the department heads are responsible.
- The GM does not have sufficient reporting mechanisms to monitor the performance of the operating departments. This masks problems that arise and grow undetected, eventually blowing up, and ultimately requiring time-consuming GM intervention and involvement. If the GM is only using the monthly operating statement to monitor performance, he is flying blind to the details of his operation and does not have real-time information upon which to base decisions and take actions. A properly implemented system of [departmental benchmarks](#) and reports would help with this problem.
- The difficulty of holding department heads accountable for the performance of their departments, which leads to toleration of weak department heads and poor performing departments. Without work plans with measurable accountabilities and benchmarks any attempt to hold subordinates accountable is dependent upon weak and subjective evaluations.

The miring of General Managers in day-to-day operational problems prevents them from engaging their key strategic responsibilities.

The following is a list of the strategic requirements of a general manager:

1. In conjunction with the governing board, establishing the organizational culture, mission, vision, guiding principles, and operating standards.
2. Establishing a strategic plan to guide long-term direction, goals, and priorities.
3. Providing the board with timely and accurate information and routine reports to help them fulfill their requirements to oversee the operation.
4. Managing member perceptions by maintaining a visible presence in the operation and communicating frequently and thoroughly with the members.
5. Maximizing sales by ensuring that a “stretch” marketing plan is developed and that the membership director or committee provides ongoing reports detailing efforts to generate leads, qualify prospects, and selling memberships.
6. Establishing and ensuring compliance with club operating standards, policies, and procedures ([The Club Operations Plan](#)).
7. Providing ongoing strategic thinking, planning, and decision making.



8. Implementing and maintaining a discipline of thorough planning and [continual process improvement](#).
9. Establishing annual operating and capital budgets to guide the financial performance of the operation.
10. Establishing and ensuring implementation or execution of organization culture, annual plan, annual operating and capital budgets, and department head work plans.
11. Establishing monthly review of departmental operating performance, ongoing departmental benchmarks, [Tools to Beat Budget](#), and other indicators of operating performance.
12. Monitoring and establishing accountability for operating performance of all departments.
13. Establishing consistent club-wide [Service-Based Leadership](#) and [professional development](#) of department heads and supervisors to include:
  - a. Training (leadership development, organizational culture, legal compliance issues [sexual harassment, appropriate interview questions, disciplinary procedures, etc.], liability abatement issues [safety, food sanitation, hazardous material handling, responsible alcohol service, etc.], and operational and organizational issues).
  - b. Work planning by developing meaningful goals, work plans, and objective measures of performance.
  - c. Mentoring of key subordinates to take on some of the GM's duties.
  - d. Monitoring performance using Real Time Accounting ([Tools to Beat Budget](#)), monthly benchmarks, and reports from subordinates.
  - e. Conducting meaningful reviews tied to work plan accomplishment and operational performance.
  - f. Establishing accountability based upon meeting work plans and performance goals.
14. Establishing and ensuring consistent staff development to include:
  - a. Initial training in organizational culture, liability abatement issues, and position skills training.
  - b. Ongoing training in same.
  - c. Employee empowerment.
15. Establishing and maintaining the means to continually communicate with constituencies.
16. Ensuring department heads top-grade talent by using Disciplined Hiring and Screen for Success when recruiting, screening, and hiring.
17. Ensuring appropriate [internal control](#) systems and processes.
18. Ensuring the cleanliness, upkeep, and maintenance of all facilities, grounds, furniture, fixtures, and equipment.
19. Ensuring a [safe operation](#) for employees and customers.
20. Ensuring the operation's legal compliance with all aspects of federal, state, and local laws such as FLSA, FMLA, ADA, EEOC, youth employment, alcohol laws, food sanitation, etc.
21. Establishing and maintaining a continually fresh and robust schedule of activity programming for members of all ages and interests.
22. Ongoing professional self-development per self-developed work plan presented to and approved by the board.





As can be seen from the foregoing list of strategic requirements, a general manager has much to do – primarily in guiding the direction, quality, and performance of the operation. Given the scope of these large responsibilities, GMs cannot afford to be bogged down in the day-to-day details of the operation – this detail is the job of individual department heads.

Though it is often a challenging and time-consuming process to organize the operation, train subordinate managers to fulfill their responsibilities, and maintain high standards, ultimately the time spent developing managers and establishing the disciplines of a well-run operation are worth the effort. No general manager can do it all and must depend upon subordinate managers to do their jobs properly allowing him time to focus on strategic issues.

Jim Collins, in his groundbreaking book *Good to Great: Why Some Companies Make the Leap . . . and Others Don't*, identified the critical success factors of great companies. One of those factors was the need for “disciplined people taking disciplined action.”

In other words, the entire management staff must understand the full requirements of their positions and execute them in a disciplined way – that is, routinely and without being told. Only then can the general manager focus on the long-term health and direction of the enterprise. While Collins’ book addressed large publicly traded companies, the same principles apply just as much in the challenging world of club operations.



## What I Expect from My Department Heads

There are a number of things I expect from all the department heads regardless of their specific areas of expertise and function.

1. **Leadership.** I expect a consistent [Service-Based Leadership](#) style for all departments. Service-based leadership naturally promotes [employee empowerment](#) which is essential to delivering remarkable service levels.
2. **Organizational values.** Strict adherence to and promotion of the organization's culture of service is necessary to ensure that all employees understand the values that underpin the business. The consistent example of managers at all levels is a must.
3. **Annual departmental plans and goals.** Each department head must develop departmental goals based upon the club's annual plan. These goals have an impact on department plans and budgets.
4. **Standards, policies and procedures.** These are necessary for all areas of the operation to promote standardization and efficiency. They are also the basis for developing training material for each department.
5. **Tools to Beat Budget.** The discipline of tracking revenues and expenses in real time (Real Time Accounting) makes department heads more knowledgeable about their enterprise and enables them to take timely action to correct deficiencies. It's also an incredibly effective tool for improving the ease, as well as the accuracy, of developing departmental budgets.
6. **Benchmarking.** Every department head must benchmark their payroll expenses in detail. As the single largest expense in most departments, it is essential that they track and monitor this expense. In addition, they need to benchmark their respective operations to ensure they have a better understanding of their business.
7. **Accounting requirements.** There are accounting requirements for all department heads, and they are expected to meet these in a timely and accurate manner.
8. **Human resource requirements.** Each department head is expected to have a thorough knowledge of all HR requirements and strictly adhere to these. There are too many legal and liability issues to do otherwise.
9. **Monthly financial performance and work plan review meeting.** Every month after the financial statement is distributed each department head will meet with the general manager and controller to review financial performance and progress on work plan accomplishment. Department heads must be prepared for this meeting by ensuring their Tools to Beat Budget binders and benchmarks are up to date, can explain significant variances, and offer plans to remedy material revenue shortfalls and expense overages.
10. **Departmental training.** Department heads are responsible for determining their department's individual skills and service technique training needs and developing training programs to meet those needs.
11. **Disciplined hiring.** It is a requirement that department heads develop the skills and disciplines to hire well. The quality of enterprise staff is too important to leave to chance.
12. **Organization, cleanliness, and maintenance.** All departments must be well-organized, clean, and well-maintained. Department heads are responsible for their areas of the operation and must coordinate with the



facility manager and/or executive housekeeper to ensure cleaning standards are established and met, as well as ensuring all facilities, furniture, fixtures, and equipment are properly maintained.

13. **Safety and security.** Each department head must determine work hazards and security issues for his or her areas and develop the standards, policies, and procedures, as well as training, to address these.
14. **Team players.** Each department head must realize that they are part of a team dedicated to the common purpose of providing a superior private club experience. To meet the challenges of such an operation, they must be mutually supportive and work together as a team.

While there may be other things that I want to stress to my subordinate managers from time to time, these are my basic expectations. Other general managers may have a different or additional set of expectations, but in any case, it's good to provide your subordinates with a list of those requirements. It becomes the basis for their efforts to develop themselves as managers and leaders.



## **Supervisory Responsibilities**

The work of all club employees is assigned, directed, supervised, and reviewed by a department head or supervisor. Each employee will ordinarily have only one supervisor.

Effective supervision depends upon the ability of supervisors to get employees to do what is necessary with professionalism and enthusiasm. Supervisory responsibilities include:

- Directing employees' work.
- [Hiring, training, developing, counseling, and disciplining employees](#) as necessary. Recommending discharges to general manager.
- In conjunction with Annual Club Plan, establishing goals for their department or section.
- Establishing and maintaining high standards of service, quality, and job performance for employees. Providing a strong emphasis on service to members.
- Resolving service issues in a prompt, courteous way. Seeking constant feedback from members concerning quality of operation. Ensuring that all employees have a complete dedication to the needs and desires of members.
- Establishing [systems, standards, policies, and procedures](#) for the efficient operation of their department or section. Paying close attention to the details of the operation that distinguish an outstanding operation from a merely good one.
- Supervising employees, ensuring that all systems, standards, policies, and procedures are followed. Supervising the work of employees with emphasis on high levels of quality and service, making on-the-spot corrections as necessary. Constantly reinforcing ideals of quality and service to employees.
- Developing [comprehensive training programs](#) and providing ongoing individual skills and service technique training for employees.
- Creating [departmental staffing guides](#) as the basic structure to control pay and benefit costs.
- Scheduling employees in the most cost-effective way to accomplish necessary work. Verifying hours worked.
- Monitoring and [controlling departmental payroll costs](#). Ensuring that all employees have work to do throughout the workday and workweek. Sending employees home when necessary to avoid overtime and control costs. Advising management on changes in staffing structure to accomplish the work in the most cost-effective way. Preventing abuse of sick/emergency days.
- Establishing and meeting annual and monthly budgets for department. Using [Tools to Beat Budget](#) to help monitor and control expenses in real time.
- Ordering supplies as necessary. Conducting accurate inventories as necessary in a timely and thorough manner. Ensuring the security of inventories.
- Ensuring the safe operation of all equipment. Reporting equipment defects and malfunctions to maintenance for repair.



- Maintaining equipment and machinery in good working condition. Monitoring cleanliness of areas of responsibility. Cleaning as necessary and coordinating with the facility manager and/or executive housekeeper for special cleaning or areas needing attention.
- Ensuring that organization policies, including appearance and grooming standards for department, are followed by all employees.
- Instilling an awareness of energy conservation in staff.
- Benchmarking departmental performance with operating statistics tracked over time and analyzed continuously.
- Establishing and maintaining effective communication with departmental staff, other departments, and senior management.
- Establishing and maintaining a high degree of motivation and morale within department.
- Ensuring a safe workplace. Training employees concerning safety issues.
- Ensuring a secure workplace. Developing and maintaining a security consciousness among staff.
- Working together with other department heads and supervisors to develop a team-like approach to the operation where the emphasis is placed on problem discovery and solution.



## Managers' Financial Responsibilities

Managers with bottom-line responsibility are responsible for the financial performance of their areas of the operation. There are a number of specific elements associated with this responsibility including:

**Budgeting.** Budgeting is the process of establishing a financial operating and capital plan for the future year. Budgets are formulated using history, benchmarks, knowledge of upcoming events or trends, and one's best professional judgment.

**Comparing Actual Performance to Budget.** Once approved, budgets are the financial plan for the year. Managers are responsible for comparing actual performance to budgets on a monthly basis and intervening as necessary to achieve budgeted performance.

**Achieving Revenues.** Achieving revenue projections is one of the two primary means of meeting budgets (the other being controlling expenses). Managers are responsible for monitoring revenues and aggressively intervening when revenues fall short.

**Controlling Cost of Goods Sold.** Departments with retail operations must also control the cost of goods sold and investigate when these costs are out of line. Managers can do this by ensuring accurate monthly inventories, carefully tracking departmental transfers and adjustments, and using retail buying plans.

**Controlling Payroll Costs.** Payroll is the single largest expense in most operations and the most significant expense that managers must control. To control payroll costs, it is vital that managers have timely and accurate data regarding their departmental payroll costs. Essential to getting this data is establishing departmental staffing guides, having staff correctly follow timekeeping procedures, setting schedules to meet forecasted levels of business, and the dogged determination to track payroll expenses closely to ensure that budgets are not exceeded.

**Controlling Other Expenses.** Other Expenses comprise all the other departmental operating expenses. Managers can control these expenses by carefully reviewing expenditures on a monthly basis, using some means, such as Tools to Beat Budget, to track other expenses in real time, and by periodic in-depth reviews of significant expense accounts.

**Benchmarking.** Benchmarking is the act of measuring operating performance. Each department head should track detailed benchmarks for his area of the operation

**Pricing.** The starting point for meeting revenue projections is proper pricing of products and services to ensure a sufficient markup to cover associated expenses. Pricing should be reviewed on a periodic basis to assure that budgeted margins are being maintained.

**Purchasing.** Some managers are responsible for purchasing materials, supplies, and inventories for their departments. Managers must be familiar with all [club purchasing policies](#) to properly fulfill these responsibilities.

**Expense Coding.** Managers are sometimes responsible for ensuring that invoices for all purchased items are coded to appropriate expense accounts in a timely, accurate, and consistent manner.

**Inventory Management and Security.** Given that high inventory levels tie up capital that might be put to better use elsewhere, managers must use common sense and good business judgment to maintain inventories at levels that balance business demands, lower pricing for bulk purchases, perishability of stock, and available



warehousing space.

Inventories must be kept secured with access limited to as few individuals as possible. Storerooms must be kept neat, clean, and organized to facilitate physical inventory counts and minimize damage and spoilage.

Merchandise inventories should be purchased using Open to Buy or other retail buying plans, thereby constantly monitoring inventory levels and product mix while minimizing markdowns. All special sales of merchandise during the year should be noted and marked-down items analyzed compared to buying plans to ensure that lessons are learned from buying mistakes.

**Asset Management.** Managers are responsible for protecting the assets assigned to their departments and in their care. Periodic physical counts are required for assets under their control:

- Resale inventories (food, beverage, pro shops) – monthly to determine cost of goods sold.
- Supply inventories, such as linens, china, and glassware – quarterly to ensure you have enough stock on hand. Some consumable items, such as ware washing chemicals, cleaning supplies, and paper products should be inventoried more frequently.
- Furniture, Fixtures, and Equipment inventories – annually to ensure presence and accountability.

**Internal Control.** Internal control is defined as the systems and procedures established and maintained to safeguard a business' assets, check the accuracy and reliability of its accounting data, promote operational efficiency, and encourage adherence to prescribed managerial policies.

Internal control, while often considered an accounting function, is a function of management. The ultimate responsibility for good internal controls rests squarely with managers.

**Point of Sale (POS) Transactions.** The initial entry for most revenue data is through point of sale systems. Managers are responsible for training their employees to correctly use the POS system and to retrain as necessary when a pattern of errors is evident in their departments.

**Accounting Standards, Policies, and Procedures.** Managers should be familiar with and follow all requirements of their [Club Accounting Standards, Policies, and Procedures](#) and recommend changes as necessary.

**Summary.** The thoroughness and professionalism with which managers meet these financial responsibilities will have much to do with their success. Each manager should consider which ones he currently does well and in which areas he needs to improve his performance.



## Management Professionalism

Certain actions on the part of managers and supervisors will cause problems for the operation. The following basic guidelines will help managers avoid problems and set the proper example for those they lead.

**Consistency in all personnel actions.** In today's litigious society it is essential that all personnel actions from screening interviews, to hiring, to providing opportunities for training and promotion, to counseling, disciplining, and discharging be consistent, fair, and professional.

**No retaliation.** Employees have a right to come forward with their problems and concerns. While managers may expect that employees will come to them first, employees may feel that management is part of the problem. Should employees go over a manager's head or file complaints against the manager, you should never retaliate against them. The best way to avoid this is for managers to have open communications with employees and be approachable for their problems and concerns.

**No sexual harassment.** Sexual harassment is defined as unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- Submission to such conduct is made either explicitly or implicitly a term or condition of an individual's employment,
- Submission to or rejection of such conduct by an individual is used as the basis for employment decisions affecting the individual, or
- Such conduct has the purpose or the effect of interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment.

Sexual harassment is against the law, and it is the policy of the club that any incident of alleged sexual harassment be reported to management immediately. Allegations must be quickly and thoroughly investigated.

**No discriminatory practices.** Biases, prejudice, disparaging remarks or jokes based on race, creed, religion, gender, national origin, ethnic group, age, sexual orientation, gender identity, or handicap cannot be tolerated. There is no place for bigotry or personal and cultural insensitivity in the workplace. While each person has his or her own biases and prejudices, they should never interfere with a manager's conduct and decisions. This behavior demeans people. It demeans those who do it and those who are subjected to it. Since the organization is the sum of its parts, words or actions that attack the self-esteem of any employee for any reason damage the club as a whole.

**No favoritism.** Managers must scrupulously avoid any appearance of favoritism. The fact or perception of favoritism creates serious problems among employees. Many employee complaints stem from perceptions of unfairness on the part of leaders. Time, money, and energy are spent responding to these complaints, which take away from the focus on member service, improving operations, and planning. In addition to the problems created for the organization, the perception of unfairness creates dissension and poor morale and destroys motivation within your work team.

**No fraternization with employees.** Managers must never, under any circumstances, enter personal, intimate relations with employees under their direction. Should a manager feel drawn into such a relationship, he or she must take steps to ensure that one or the other party in the relationship resigns his or her position. Just as nepotism creates problems in an organization, personal relationships with employees will interfere with the performance of a manager's official duties.





**No waste, fraud, or abuse.** Managers must abide by the highest ethical standards. If they cut corners and bend the rules when it comes to safeguarding the assets of the enterprise, they can expect their employees to do likewise. This is particularly important regarding one's personal productivity. Managers shouldn't expect employees to work hard if they don't set the example. Managers who abuse any privilege associated with their position risk the loss of their employees' respect.

Ethical standards are at the very heart of what managers do – their personal and professional integrity. Often the appearance of wrongdoing can be as damaging as the reality. By following the spirit as well as the letter of ethical requirements managers set an unassailable example of conduct for those they lead and serve.

**No disclosing confidential information.** Managers must never share confidential personnel or disciplinary information. What happens at the workplace should stay there. While it is impossible to control the rumors and gossip circulating among staff, managers must be mature enough to maintain confidentiality and not engage in this activity themselves.

Information about the organization, such as financial statements, operating statistics, and internal problems should not be disclosed to persons or organizations external to the business.

**No complaining to employees.** Managers shoulder the burden of many responsibilities. When things are not going well, it is all too easy for a manager to seek out someone with whom to share the burden. This someone should never be an employee. A major requirement of leaders is to possess the emotional maturity to understand the potential negative consequences of confiding anxieties, doubts, and grievances to subordinates.

**No favors from vendors.** Frequently, managers will be offered favors and gifts by vendors. These may be in the form of seemingly small personal items, free products for personal use, gifts at holidays or on birthdays, tickets to concerts and sporting events, or invitations to parties to thank managers for their patronage. While these may be genuine expressions of appreciation, they create significant ethical problems for the managers. Even in subtle ways they cloud one's judgment, making it difficult to be truly objective in purchasing decisions. Accepting even small favors starts managers down a slippery path. At what point do they say no when they have repeatedly said yes?



### Manager's Code of Ethics

In an ideal world, Club managers could trust everyone to do the right things, but such a world does not exist. The unfortunate fact is that if management teams are not trained to a common standard of ethical behavior, some will transgress. And this is of primary importance because if managers and leaders don't set an unimpeachable example, employees will cut corners as well.

This list of ethical expectations must be embraced by managers and supervisors at all levels of club operations:

1. As a representative of the club at which I work, I understand that my actions and behavior, both at and away from work, reflect on the organization that provides my employment. I will, therefore, do everything in my power to represent them faithfully and professionally in all my dealings with members, employees, vendors, and the community at large.
2. I will organize the work areas for which I am responsible and thoroughly train the employees I supervise to ensure the most efficient operation with the highest levels of service possible.
3. I will not use or remove club property for personal use and will protect the assets and resources of the operation as if they were my own. My vigilance and example will ensure the employees I supervise do likewise.
4. I understand that my leadership and example set the standard for my employees. I understand that a manager who shirks responsibilities, cuts corners, fails to give an honest time commitment, pilfers food and supplies, fails to secure inventories, or is not personally productive in time or commitment, can expect his or her employees to do the same.
5. I will not exchange club goods or services for personal favors or services from members or vendors. Further, I will not accept personal favors, gifts, or rebates from vendors in any form. Such items benefit me at my employer's expense and are appropriately considered kickbacks. My only interest is to get the best price for my place of business, and I will make every effort to do so by seeking competitive pricing from several vendors.
6. While I may direct employees' work, their productive effort and well-being serve the interests of the club that employs them. Therefore, I must work hard to ensure their maximum contribution to the mission and goals of the organization. I can only do this if I value each employee as an individual whose contribution to the collective effort is directly dependent upon my leadership, as well as the tools, training, resources, engagement, and support I provide them.
7. I will never use my position or authority to request or require personal services or favors, sexual or otherwise, from employees.
8. I will never enter personal or intimate relations with any employee who works under my direction or is directly or indirectly supervised by me. Such an inappropriate relationship damages the organization by implications of favoritism and clouded judgment. Ultimately, it irretrievably harms both my ability to lead and my personal and professional reputation.
9. While maintaining a positive interest in and influence over the efforts of my employees, I recognize the importance of maintaining a professional distance from them. I will not socialize or party with those I supervise, except while attending club-sponsored social events or in the furtherance of club business.



10. Finally, I recognize that my integrity is at the core of my personal and professional standing. It is the most important ingredient of my leadership and is the foundation for any success I will achieve in my career and life. I will never be tempted to squander this most precious possession for the sake of expediency or inappropriate gain.

These basic standards should be used to indoctrinate all new managers and supervisors. It's also a good idea to have managers sign and date a copy that is placed in their personnel file. Finally, the general manager should review the Code of Ethics at least annually with all managers.



## What is Your Contribution? Competency or Legacy?

A hospitality consultant once told me his job was the easiest in the world. When the owners of a troubled property came to him for help, he said all he had to do was to find a competent general manager to turn the operation around. And certainly, we all recognize the impact that competent management can make – better leadership, strong focus and initiative, improved service levels, and enhanced performance. Yet, as a club manager, if your contribution to your board and members is merely competency, you are only doing part of the job.

A common failing in independent club operations is what I call the “cult of competency,” though Jim Collins might term it, “good is the enemy of great.” The board and members are so thrilled to have competent management, especially if they’ve had a revolving door of weak managers, that they don’t expect or get a manager focused on “legacy” achievements – that is, an operation organized around well-defined and documented systems instead of force of personality and will.

Let me be clear. When an operation’s success is founded on individual competency, its success is built upon what should be considered “unacceptable risks.” What happens when the competent manager moves on to a more prestigious club, relocates by geographical preference, retires, goes back to school, decides on a career change, becomes ill, or, heaven forbid, passes away?

When an operation without deeply ingrained organizational systems or “disciplines of success” at all levels of the operation loses its competent manager, it risks quite literally falling apart until a new competent general manager is found – and often this is not easily nor quickly done.

The alternative to this all-too-familiar scenario of competency loss is to hire a general manager who is focused on long-term, legacy solutions. But what is meant by legacy solutions? They are the deeply entrenched systems and management disciplines that result in consistently efficient and high-performing operations, whose longevity and success is not based on the individual, rather on organizational habit. Such habit includes:

- A [Club Operations Plan](#) made up of well-defined standards, policies, and procedures for human resources, accounting, and all operating departments.
- Implementation of consistent [Service-Based Leadership](#) throughout the organization.
- Mentoring and [professional development](#) of subordinate managers.
- Establishment and use of measurable accountabilities for all management positions.
- A discipline of planning and review.
- Thorough [benchmarking](#) of operations.
- [Continual process improvement](#).
- A well-defined and executed [member relationship management plan](#).
- Financial disciplines; consistently applied.
- Disciplined hiring.
- Well-defined and continually reinforced [organizational values and culture of service](#).
- [Formal training programs](#) for managers and all line positions.



What then is the difference between a competent and legacy manager? A general manager's strong commitment to leave the operation poised for continued success when he or she departs.

Owners, club boards and executive search consultants put tremendous time and effort into finding competent managers for organizations and clients. I would argue that they go beyond competency and find those rare GMs who recognize the higher calling of providing legacy leadership.

One final point: Jim Collins, in his ground-breaking book *Good to Great*, found that every good to great company in his study had Level 5 Leaders. One of the key characteristics of Level 5 Leaders is that they "set up their successors for even greater success in the next generation." The leaders of the comparison companies (the ones that did not achieve and maintain greatness) set up their successors for failure. While comparison leaders achieved some measure of success by virtue of competency and force of will, the companies they led were incapable of sustaining success long term. On the other hand, the Level 5 Leaders provided more than just competency; they were legacy leaders – and left a legacy of greatness!



## Job Descriptions

Well thought out, written job descriptions are important part in the overall training and development of any new employee.

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.

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 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 significant 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.

# WORK PLANNING

The articles and information in this section are designed to describe and give examples of the work planning process.



## A Discipline of Planning

Managing a club without a plan is like driving through a strange land without a road map. Given the size, complexity, and money invested in making a club successful, why would anyone consider operating it by the seat of one's pants? Yet, this is exactly what managers do when they fail to establish a discipline of formal planning. And make no mistake about it, **it is a discipline** – requiring managers and supervisors at all levels to conceive and document their plans for upcoming periods and specific events. It also requires that the general manager review all planning documents, as well as review progress toward completing those plans on an ongoing basis.

Every enterprise demands a plan. Without a formal, written plan to focus attention and action upon the completion of specified goals within a specified time period, the business will lack clear direction and purpose. By putting plans in writing, the responsible manager formally commits to its accomplishment. Further, there is a common understanding on the part of both the subordinate manager and the general manager of what will happen and when. Often, the planning and execution of one department will impact other departments or the operation as a whole. Written plans ensure that all managers and department heads are fully informed about where the club is going and when things are supposed to happen. Taking all this into account, planning is not a luxury, but a necessity for efficient operations.

### Types of Plans

Planning is necessary on many levels and in many settings. Formally, the operation should have the following:

- A Club Strategic Plan covering a period of 3-5 years that establishes and develops initiatives to address the club's strengths, weaknesses, opportunities, and threats in its competitive market.
- An Annual Club Plan covering a period of 12 months, coinciding with the budgeting cycle. This plan lays out the specific goals to be accomplished during the year as part of efforts to meet the Strategic Plan, as well as progress toward continual improvement.
- A general manager's work plan for the 12 months covered by the club plan. This plan lays out measurable accountabilities for the general manager and is the basis the GM's performance review.
- Departmental plans for the 12 months covered by the club plan. These plans lay out the goals and objectives of each operating department within the overall guidance of the club plan.
- A work plan for each department head for the same 12 months. These plans lay out measurable accountabilities for department heads and are the basis their performance reviews.
- Plans for major project and events. These are plans developed for specific major tasks or activities such as purchasing new kitchen equipment, renovating a facility, leasing new golf carts, or preparing for major events or activities.

Having gone through the planning process multiple times, I offer the following advice to all general managers:

- **Start early.** Procrastination results in poor, disjointed planning.
- **Involve your staff.** Departmental plans for the coming year usually impact the overall club plan and budget. Also, since no department works in isolation, one department's plan may affect others – either materially or in the timing of events and accomplishments.





- **Challenge staff.** The general manager should explain the big picture of club direction and progress and then challenge department heads to work on specific initiatives within their departments, for example, implementing benchmarking, setting up Tools to Beat Budget, reviewing departmental training plans and material, and continual process improvement.
- **Planning is a process.** No plan is completed after one pass. Back and forth discussion between the general manager and department heads and among the different departments will further refine plans ensuring a well-integrated club plan.
- **Use planning as a team-building exercise.** Given the preceding tips, I encourage general managers to use the annual planning process as a team-building process. Call an early planning meeting with all department heads to lay out the purpose, process, and planning timeline. Then establish a series of planning meetings at which each department head presents his or her plans to the rest of the management staff for input and feedback. One department head's idea may spark others to similar plans and accomplishment. Encourage critical review of plans and challenge groups of department heads to work together to work on larger organizational or departmental initiatives.

Lastly, plans must not be a one-time task not to be looked at again. To be truly useful departmental and club plans should be reviewed often. I recommend a brief review of plans and accomplishments during the monthly review of operating statements. This ongoing review and discussion of planning will ensure timely completion of tasks and keep the organization on target to meet all its annual goals.

**Bottom Line.** The importance of disciplined planning cannot be overstated. Haphazard planning results in haphazard operations and equally haphazard performance.



## **Work Planning for Managers and Supervisors**

The job of general manager is challenging, requiring a broad-ranging skill set covering a variety of management disciplines and operational experience to do well. Yet, too often general managers get overly involved in day-to-day operations and fail to meet their strategic responsibilities. When this happens, the organization limps along, reacting to the crisis-of-the-day instead of proactively addressing issues through long-range planning.

In some cases, the underlying cause of this involvement is weak leadership and managerial development among subordinate managers. The best way to overcome this weakness is to develop subordinate leaders through training, mentoring, [professional development](#), and establishing “stretch” work plans. Though it is initially time-consuming to do, developing department heads into strong leaders and managers will allow the club to routinely function at high levels and the general manager to focus on strategic issues and other long-range matters.

While ongoing training of subordinate managers will improve their skill set, they must also develop the essential discipline of establishing and meeting goals to improve their operations. The general manager can foster this discipline by doing the following:

- Insisting upon detailed, formal work plans with timelines and milestones for each department head.
- Requiring department heads to prepare departmental goals and plans for their departments.
- Ensuring that department heads benchmark their operations to provide objective measures of progress.
- Giving honest performance reviews based upon measurable, objective criteria.

When the general manager ensures the development of formal work plans for each department head, both the general manager and the department head know what the goals are and when they are to be accomplished. Establishing timelines and milestones allows the general manager to monitor progress toward completion of goals.

Department heads must have an opportunity for input to ensure buy-in to their individual plans. A good way to do this is to require each department head to bring his or her own draft plan to the initial planning meeting. The general manager can then agree or disagree with plan elements and offer inputs to meet overall club requirements. Back and forth discussion will determine the final plan.

The agreed upon plan is then detailed in writing with priorities and timelines by the department head. Both parties sign and date the plan. The general manager monitors progress on plan completion and performance at the monthly review of financial statements meeting with each department head. When this is done, there should be no surprises when performance reviews are conducted.

The final step in the process is to review plan accomplishments during annual performance reviews. While the general manager must make allowances for changing circumstances that may have affected the completion of any plan elements, she must also hold subordinates accountable for their failures. Ultimately, the success of the club depends on it.

There is probably no more important thing a general manager can do to drive desired outcomes in a club operation than to ensure the development of detailed work plans for subordinate managers and hold them strictly accountable for results.



### **Creating Measurable Accountabilities**

I have spent a good deal of time over the course of a career trying to establish a basis for meaningful work plans with measurable accountabilities for department heads. Looking back on a long career, I would reluctantly admit that I spent too much time doing and not enough time planning and appropriately delegating.

Sure, work planning takes time, particularly if you put enough effort into it to be of value ... and finding measurable accountabilities for department head performance seems an elusive goal. Now, though, on the tail end of my career, I have finally found the time to give the matter some serious thought.

As far as work planning goes, what I expect from subordinate managers is to meet goals and budgets and to help measure their progress toward specific objectives. To do this I find it important to establish monthly reviews of financial performance, as well as timelines and milestones toward non-monetary goals, such as developing departmental operation plans and effective training programs.

On the other side of the coin, measurable accountabilities have continued to be a challenge. Over the years I've developed and deployed several versions of managers' performance evaluation criteria. Each ultimately proved unsatisfactory though they included several meaningful and worthwhile objectives such as "builds teamwork and morale," "directs work effectively," and "follows through and implements well." As good as these criteria may look on paper; they turned out to be practically meaningless as I attempted to do reviews because I had no hard evidence or objective means of measuring them. Once again, my reviews degenerated to "gut feel" or "overall sense of things." Clearly measurable accountabilities continued to prove elusive.

In recent months I've taken another stab at finding performance criteria for which I could establish specific measurable goals. Here's what I've come up with.

On the big picture scale, I've broken down performance expectations for department heads into 6 major categories – leadership, management, training, performance, compliance, and member satisfaction. These can be weighted based upon changing emphases but must equal 100%. Within each major category are sub-categories that can in some way be measured. These are also weighted, again totaling 100%. The following chart lays out the major and sub-categories, as well as the means to evaluate and who is responsible for creating the measurements.



**Managers' Performance Review Criteria and Measures**

	<b>Criteria</b>	<b>Method of Measurement</b>	<b>Measurement Responsibility</b>
<b>20%</b>	<b>Leadership</b>		
	25% Values/Culture Reinforcement	Department Head's Weekly Report of Daily Huddles	Department Head
	60% Leadership	360 Reviews, Annual Employee Survey, Employee Comments	HR Manager
	15% Employee Turnover	Personnel Benchmarks	HR Manager
	100% Total		
<b>10%</b>	<b>Management</b>		
	20% Organization, Order, Cleanliness, Maintenance	Monthly GM Inspections on pre-designed form	GM
	20% Planning (Departmental Annual Plan)	Plan Review scored for value and impact	GM
	20% Employee Development and Reviews	Review of Work Plans and Performance Reviews	GM
	20% Standards, Policies & Procedures	Review of Material scored for quality and thoroughness	GM
	20% Safety, Security, Sanitation	Monthly GM Inspections on pre-designed form	GM
	100% Total		
<b>15%</b>	<b>Training</b>		
	15% Departmental Training Plan	Annual Plan Review scored for adequacy and quality	GM
	20% Curricula Development	Annual Plan Review scored for adequacy and quality	GM
	20% Training Material Development	Annual Plan Review scored for adequacy and quality	GM
	30% Training Execution	Training Visits scored for adequacy and quality	GM
	15% Benchmarks	Monthly Review of Financials, Benchmarks and Plans	GM
	100% Total		
<b>25%</b>	<b>Performance</b>		
	30% Revenues	Monthly Review of Financials, Benchmarks and Plans	GM, Controller
	30% Pay Cost Control	Pay Period Summary Reports, Monthly Review of Financials	GM, Controller
	20% Cost of Goods Sold	Monthly Review of Financials, Benchmarks and Plans	GM, Controller
	20% Other Expense Control	Monthly Review of Financials, Tools to Beat Budget	GM, Controller
	100% Total		
<b>10%</b>	<b>Compliance</b>		
	20% Departmental Annual Plan Completion	Monthly Review of Financials, Benchmarks and Plans	GM, Controller
	20% Tools to Beat Budget	Monthly Review of Financials, Benchmarks and Plans	GM, Controller
	20% Departmental Benchmarking	Monthly Review of Financials, Benchmarks and Plans	GM, Controller
	20% Accounting Compliance	Controllers Report and Benchmarks	Controller
	20% Human Resources Compliance	HR Managers Report and Benchmarks	HR Manager
	100% Total		
<b>20%</b>	<b>Member Satisfaction</b>	Annual Member Survey, benchmarked year-to-year	Membership Dir.
<b>100%</b>	<b>Total</b>		

This whole process presupposes that the club has already instituted certain disciplines such as holding monthly reviews of financials and departmental plans with each department head; measurements such as departmental and personnel benchmarks; and both member and employee surveys.

I'm sure that there may be other worthwhile things to measure and for which subordinates should be responsible, and I'm equally sure that there will be some challenges in implementing such a system. But ultimately, I believe the benefits of holding subordinate managers strictly accountable for their performance outweighs any and all challenges encountered.



## Work Planning Procedures

The general manager should use the [Manager Performance Review, PCPM Form 115](#), to develop department head work plans. While the basic structure of the form is the same for all positions, the rating categories and relative weights of each rated item will change for different position being rated, i.e., head golf professional, facilities manager, F&B director, etc. The second tab of this MS-Excel-based form allows the Rating Manager to establish goals for each major and subordinate goal for the coming period (see next page for example).

For more complex goals, the general manager can require the department head to prepare an [Action Planning Sheet, PCPM Form 136](#), (see example on page 37), which will lay out the necessary steps to complete a particular goal and expected completion dates (milestones) for each step. Once both general manager and department head agree to the work plan, they both sign it to formally commit to its completion.

The general manager should periodically review each department head's progress towards completing the plan. A good time to do this is to take a few minutes during the monthly review of operating statements to discuss work plan progress.

While it is ultimately the general manager's responsibility to ensure that subordinate managers meet their work plans, it is also the responsibility of the subordinate manager to keep the general manager fully informed of progress and obstacles. This continuing dialogue will ensure that there are no surprises at the end of the year, requiring a negative performance review for a department head's failure to meet his or her work plan.



**Private Club Performance Management**

**Work Plan—General Manager**

Employee: John Smith Rater: Bob Jones

*\*Enter Major Goal weighted % in green shaded cells, Sub Goal weighted % in blue shaded cells, Ratings in yellow shaded cells, and comments in white sections.\**

Weighted %	Major Goals	Discussion
<b>I. 20%</b>	<b>Board Relations</b>	
40%	<i>Communication</i>	<i>In conjunction with the Board, develop a formal monthly report of operations to be attached to the monthly financial statement.</i>
60%	<i>Board Satisfaction</i>	<i>Implement a more robust benchmarking program in areas currently not being benchmarked, specifically utilities, personnel, payroll, and golf course maintenance.</i>
100%	<i>Must equal 100%</i>	
<b>II. 25%</b>	<b>Financial</b>	
40%	<i>Revenues</i>	<i>Target a 4.2% growth in revenues.</i>
40%	<i>Expenses</i>	<i>Target a 1.2% reduction in expenses. Food cost target is 36.2% and Beverage cost target is 26.0%.</i>
20%	<i>Budget Accuracy</i>	<i>Budget must be within 2% of actuals results for the year.</i>
100%	<i>Must equal 100%</i>	
<b>III. 20%</b>	<b>Membership</b>	
25%	<i>Member Satisfaction (Survey Results)</i>	<i>Develop a "Wow" plan to continually impress and exceed member expectations. Achieve or improve upon last year's level of member satisfaction as measured by survey results.</i>
30%	<i>Enrollment</i>	<i>Develop a plan to increase memberships: 8 golf, 20 sports, and 16 social.</i>
20%	<i>Retention</i>	<i>Keep total resignations below 15.</i>
15%	<i>Quality &amp; Quantity of Communication</i>	
10%	<i>Committee Development &amp; Involvement</i>	
100%	<i>Must equal 100%</i>	



**Private Club Performance Management**

**Work Plan—General Manager**

Employee: John Smith Rater: Bob Jones

*\*Enter Major Goal weighted % in green shaded cells, Sub Goal weighted % in blue shaded cells, Ratings in yellow shaded cells, and comments in white sections..*

Weighted %	Major Goals	Discussion
<b>IV. 20%</b>	<b>People Plan</b>	
25%	<i>Overall HR, Staffing, and Training</i>	<i>Reduce overtime to 6% or less of total payroll. Develop a club-wide training program to include curricula for each position. Implement safety training for all departments.</i>
20%	<i>Safety &amp; Worker's Comp.</i>	
20%	<i>Employee Satisfaction (Employee Survey)</i>	<i>Investigate and present a plan to the Board to provide employees with a 401k Retirement Plan.</i>
15%	<i>Development Plans</i>	<i>Prepare detailed work plans for each Department Head and make them as objective as possible.</i>
20%	<i>Personal Development</i>	
<b>100%</b>	<i>Must equal 100%</i>	
<b>V. 15%</b>	<b>Operations</b>	
20%	<i>Clubhouse Maintenance &amp; Cleanliness</i>	<i>Address the issue of early morning cleanup in a proactive way. Organize the maintenance staff and institute a work order system and methods to benchmark the club's maintenance effort.</i>
20%	<i>Food &amp; Beverage</i>	<i>Rotate Dining Room menus quarterly. Develop better controls for snack operations. Target a 20% margin for the Department.</i>
20%	<i>Golf Operations</i>	<i>Develop an annual plan for golf programming. Have Head Golf Professional work with the Golf Committees to implement.</i>
20%	<i>Golf Course Maintenance</i>	<i>Continue to remedy the drainage problems on the back nine.</i>
20%	<i>Activities</i>	
<b>100%</b>	<i>Must equal 100%</i>	
<b>100%</b>	<i>Must equal 100%</i>	
<b>VII.</b>	<b>Summary of Performance</b>	
<p>The focus for this year should be better organization and training in all departments. In addition, expand the benchmarking program to include all departments.</p>		

John Smith      12/15/xx  
Employee Signature      Date

Bob Jones      12/15/xx  
Rater's Signature      Date



**Private Club Performance Management**

**Action Planning Sheet**

Name:	<i>Ronald Chambers</i>	Department:	<i>Facility Maintenance</i>
Job Title:	<i>Facilities Manager</i>	Supervisor:	<i>John Smith</i>
Period: From:	<i>January 1, 20XX</i>	To:	<i>December 31, 20XX</i>
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:	<i>Develop and implement a plan to improve early morning cleanup</i>	Expected Completion Date:	<i>5/1/20XX</i>
Action Step #1:	<i>Survey premises for problem areas and draft cleaning standards.</i>	Expected Completion Date:	<i>2/15/20XX</i>
Action Step #2:	<i>Determine staffing needs and schedule revisions.</i>	Expected Completion Date:	<i>3/1/20XX</i>
Action Step #3:	<i>Hire and train additional staff.</i>	Expected Completion Date:	<i>4/15/20XX</i>
Action Step #4:	<i>Implement plan.</i>	Expected Completion Date:	<i>5/1/20XX</i>
Action Step #5:	<i>Measure improvements with weekly inspections and report.</i>	Expected Completion Date:	<i>Ongoing</i>
Action Step #6:		Expected Completion Date:	

Dates of intermediate reviews:	<i>Keep GM informed of progress at monthly review of financial statements meeting.</i>
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Supervisor's Signature:	<i>John Smith</i>	Date:	<i>1/15/20XX</i>
Employee's Signature:	<i>Ronald Chambers</i>	Date:	<i>1/15/20XX</i>





### **Work Planning for Employees**

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 club. Managers have a vested interest in the success of all employees. Managers want them to succeed because they will help the section, department, and ultimately the club succeed.

The surest way to guarantee employee 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 managers' continual interest and active participation.

While not as critical as preparing work plans for managers, it is sometimes useful to prepare an [\*Employee Development Plan, PCPM Form 116\*](#), for an employee who shows greater potential or whose performance is weak and may be a candidate for an unsatisfactory performance review.

In any case, every employee deserves to know what the expectations are for his position and what criteria he'll be evaluated on. For this reason, supervisors should sit down with each new employee and review both the job description and the [\*Employee Performance Review, PCPM Form 114\*](#), to ensure he understands the job requirements and how he'll be rated. After all, managers cannot expect an employee to know what is expected of him or what he will be rated on unless that critical information is shared with him early in his employment.



Private Club Performance Management

Employee Development Plan

Name:	<b>Johnny Staff</b>	Department(s):	<b>Dining Room</b>
Job Title:	<b>Server</b>	Supervisor:	<b>Brad Jones</b>
Development Period:	From: <b>7/10/02</b>	To:	<b>8/10/02</b>
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:	<b>Failure to follow sidework procedures.</b>		
Specifics Steps to Improve:	<b>1. Retrain on sidework procedures. Instruction by supervisor.</b> <b>2. Pass written test given by supervisor.</b> <b>3. Perform sidework on days scheduled. Supervisor will inspect when completed.</b> <b>4. Supervisor will spot check during period.</b> <b>5. Supervisor will review progress formally each week during period.</b>		
Time frame to demonstrate improvement:	<b>1 month</b>		
2. Statement of Problem:	<b>Poor wine sales.</b>		
Specifics Steps to Improve:	<b>1. Retrain on wine selling techniques. Instruction by supervisor.</b> <b>2. Pass written test given by supervisor.</b> <b>3. Apply principles of wine selling.</b> <b>4. Supervisor will track sales each week. Target 10% increase each week until sales match rest of staff's.</b> <b>5. Supervisor will review progress formally each week during period.</b>		
Time frame to demonstrate improvement:	<b>1 month</b>		
3. Statement of Problem:	<b>Poor attitude. Sloppy service.</b>		
Specifics Steps to Improve:	<b>1. Retrain on table side service techniques. Instruction by supervisor.</b> <b>2. Pass written test given by supervisor.</b> <b>3. Show interest in work. Interact with guests. Know specials.</b> <b>4. Supervisor will monitor progress.</b> <b>5. Supervisor will review progress formally each week during period.</b>		
Time frame to demonstrate improvement:	<b>1 month</b>		
Frequency of intermediate reviews:	<b>Weekly on Friday afternoons - 3 p.m.</b>		
Dates of reviews:	<b>7/15, 7/22, 7/29, 8/10</b>		
Supervisor's Signature:	<i>Brad Jones</i>	Date:	<b>7/10/99</b>
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:	<i>Johnny Staff</i>	Date:	<b>7/10/99</b>

Specify problem, specific steps and time frame for improvement.

Specify date/time for intermediate reviews. Sign and date. Have Employee sign and date.

# PERFORMANCE REVIEWS

The material in this section is designed to provide management staff with guidance on the methods and means of giving formal performance reviews.



## **Performance Reviews**

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 also part of the ongoing training and performance management efforts of the club.

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 his or 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.

Prior to a performance review, a supervisor must explain to an employee the criteria by which her 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, as well as her expectations for the new hire's performance.

### **Performance Review Principles**

- Reviews must be based on specific facts, not generalities. Rating managers should keep notes throughout the review period on the quality and deficiencies of an employee's work (see Staff Notes below for more information). If this is done, a manager will be able to provide a meaningful review based on fact and will be able to give relevant examples to the employee to ensure he understands.
- Reviews should be honest, fair, and candid. No rating manager should attempt to avoid conflict with an employee by giving an overly positive evaluation. Such an evaluation could be used as evidence of the club's satisfaction with her work in a wrongful termination case.
- Rating 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 rating manager has negative perceptions, the manager 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 negative review should never come as a surprise to the individual.
- 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.



- While attitude is often an underlying cause of poor performance, managers should never indicate that an employee has “a bad attitude” during a performance review. Instead, the manager should describe the behaviors that are indicative of an attitude problem such as failing to demonstrate teamwork; making excuses for poorly performed work; body language, facial expressions, and tone of voice that indicate an unwillingness to perform assigned work; lack of respect for coworkers and management; and complaints from members or coworkers. By adequately describing problematic behaviors instead of making a value judgment that the problem is due to “bad attitude,” a manager should not be challenged about the poor evaluation.
- Performance reviews are only as meaningful and useful as the effort put into them by the supervisor. If done in a haphazard, “I could care less” way, they will serve no useful purpose other than establishing a cynical and alienated attitude on the part of the employee.

### 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 his 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. An alternative location for these notes would be in an MS-Word file on a personal computer or smartphone.

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

### Types of Reviews

There are three different occasions when a formal performance review is warranted:

1. **Introductory period review** – These reviews are mandatory for all employees 15 days before the end of their introductory period (75 days after hiring). Every person wants and deserves to know how he is doing. It is important for the club to determine if the new hire will meet the club’s standards of conduct and work performance, and it’s important for the new hire to know where he stands and what improvement may be necessary for continued employment.

The introductory period review should include:

- A candid conversation regarding the individual’s work performance based on an objective assessment.
- An [\*Employee Development Plan, PCPM Form 116\*](#), if necessary, to improve those areas of work performance with the most opportunity or need.
- A decision to end or continue the introductory period. If a new hire’s work has not met expectations and the rating manager wishes to extend the introductory period, she must document the areas of



unsatisfactory work performance and have prior approval from the General Manager. A [Notice of Extended Introductory Period, PCPM Form 126](#), must be completed. Then the rating manager will meet with the employee and explain the reasons for extending the introductory period. The completed Notice of Extended Introductory Period will be given to the employee and a copy will be provided to the HR manager or personnel administrator.

If the employee completes the introductory period, it will be communicated to him during the review session and noted on the performance review form.

Introductory reviews are initiated by the HR manager or personnel administrator.

2. **Annual review** – These reviews are for all employees once a year during the month of January or some other prescribed time. There are multiple purposes for these annual formalized sessions. Accurate documentation and scoring will support reasons to award or withhold pay increases. A candid discussion about past performance enhances the relationship between a rating manager and a subordinate, as well as sets a foundation for setting goals for the future. The discussion confirms, realigns, or establishes expectations. Everyone wants to know how their performance is perceived and acknowledged by management. They want to know how their contribution to the team impacted the team's results. They also want to know future goals, so they know what a "win" will look like.

If an introductory review has been done for an employee within 3 months of the due date of the annual review (i.e., on or after November 1<sup>st</sup>) no review will be due until the next annual review.

Annual reviews are initiated by the HR manager or personnel administrator.

3. **Discretionary review** – These reviews are optional and may be given any time a rating manager feels the need to document an individual's performance by using a formal performance review. This will be done when an employee is having performance problems or when the rating manager wants to recognize "above and beyond" performance.

These reviews are initiated by the rating manager.

### Forms

Two forms are used in the Performance Review Program:

1. The [Manager Performance Review, PCPM Form 115](#). The basic form can be used for any management or supervisory position by modifying the rating criteria. This and other forms can be found on the [PCPM Marketplace store](#).
2. The [Employee Performance Review, PCPM Form 114](#), used for all line employees.

These forms are designed to make the review process consistent, fair, and easy to use. This does not preclude rating managers from including additional review criteria so long as they are used to evaluate all employees in a position according to the same standard.

Completed performance review forms will be signed by the rating manager and the rated employee will also be asked to sign the review, though if she chooses not to sign, simply note it on the review form. Three copies will be made.

- The completed original will be placed in the employee's personnel file,
- A copy is given to the employee, and



- A copy is retained by the rating manager in his files.

### Responsibilities

1. **Rating Manager** – Each rating manager is responsible for conducting mandatory reviews for all employees according to schedule, that is, 15 days before the end of the introductory period for new hires and once a year for employees' annual reviews.

Rating managers are responsible for conducting the reviews in a professional and meaningful manner, correctly filling out the review forms, having the reviews endorsed by the next higher manager, and forwarding the original copy to the HR manager or personnel administrator for inclusion in the employee's personnel file. Further, rating managers are responsible for preparing an [Employee Development Plan, PCPM Form 116](#), when necessary.

2. **HR Manager or Personnel Administrator** – The HR manager or personnel administrator is tasked with responsibility for overseeing and administering the club's performance review program. This individual will also monitor rating managers' compliance with the schedule and adequacy of reviews and report any problems to the general manager.

The HR manager or personnel administrator will ensure that introductory and annual reviews are initiated at the appropriate times by sending review forms (with the names of those to be reviewed) to rating managers with a suspense date for completion. He or she is also responsible for filing the completed review form in the individual's personnel file.

3. **Review and Endorsement**

Performance reviews for managers and supervisors will be completed by the general manager or department heads as appropriate and endorsed by the general manager. The general manager's review is completed by the club president or owner in conjunction with the any board members.

Performance reviews for line employees will be completed by their supervisor or department head and endorsed by their department head or general manager, as appropriate.

### Performance Review Meetings

The most effective performance review may include three separate contacts with the employee.

1. **Preparatory Meeting.** The first contact is very brief and is used to schedule a date, time, and location in the coming 2-4 weeks for the performance review meeting. This setting a date and time is also a good opportunity to briefly review again the review form and rating criteria. Some rating managers will give the employee a blank form and ask him to fill it out prior to the performance review meeting. While optional, the practice of self-rating can be useful in that it forms the basis for comparing perceptions and encourages a dialogue during the review session.
2. **The Performance Review.** This is the main review session and is discussed in greater detail below.
3. **The Follow-Up.** This brief contact a few days after the session is used to follow up with the employee to see if there are any additional questions or comments and ensure that both agree about what must be done prior to the next review session. Achieving this agreement and the employee's buy-in for any necessary improvement will make the next review session even more meaningful and productive.





### **Conducting a Meaningful Review**

- Prepare and review staff notes relating to the employee.
- Outline all specific points of discussion.
- Set up an appointment with the employee for the review.
- Meet privately with the employee in a quiet, uninterrupted setting.
- The performance review includes a discussion about past performance. Its primary values are to recognize great performance and review opportunities for performance 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.
- Explain the purpose of the review. Explain the desire for dialogue, whereby both you and she will have an opportunity to discuss fully and frankly all matters relating to the review. Establishing a dialogue will contribute greatly to a successful review. If the employee perceives that the meeting is one-sided, with only the supervisor expressing his perceptions and concerns, with no opportunity for the employee to ask questions or express concerns, the value of the review will be diminished. The best review allows both supervisor and employee to leave feeling that they were heard. Listening to the employee may point out to the conscientious supervisor (one who is truly interested in the welfare and quality performance of his department) areas in which he can improve and grow as a supervisor.
- Review the employee's conduct and work performance based upon specific observations recorded in the individual's staff notes.
- Praise and constructively criticize as warranted. If criticism is required, criticize the behavior, not the person. There is a big difference between "Your attendance record needs improvement" and "You are not a good employee (i.e., person) because you are out of work too much."
- Discuss areas of desired improvement. If deemed necessary, prepare and discuss an [\*Employee Development Plan, PCPM Form 116\*](#), and a timetable to achieve improvements. If the supervisor can get the employee involved in preparing the plan, he will have a greater commitment to achieving it. While this is a desirable outcome, it is still up to the supervisor to ensure that the plan meets her needs and the needs of the department.
- Be open to changing any of your criteria ratings if the employee provides compelling or convincing reasons why you should. Sometimes a rating manager's perceptions are based upon faulty or partial information and a willingness to "be fair" may go a long way toward gaining the employee's trust, cooperation, and commitment.
- Finalize the discussion by setting expectations and laying out specific goals to accomplish prior to the next time you meet.
- Impress upon the employee that it is his responsibility to favorably impress his supervisor regarding conduct and performance. While the supervisor is available to offer reasonable help to an employee having problems, it is ultimately the employee's responsibility to do his job well.





- Allow the employee to ask questions or bring up anything on his mind.
- After the review session has been held and both parties have expressed their opinions, prepare the review form which documents the discussion. At the earliest opportunity present this to the employee in private. He may or may not choose to sign it. If he doesn't, simply note the fact that he chose not to sign, provide him a copy, save one for the departmental files and send the original to your supervisor for endorsement.
- After your supervisor has endorsed the review, it is sent to the Personnel Administrator for inclusion in the employee's personnel file.

Supervisors have a vested interest in the success of a given employee. How the supervisor conducts the review, and the meaningfulness of the review has a lot to do with the supervisor's thorough preparation, detail, and openness with the employee.

**Choosing Not to Sign.** Occasionally employees may not agree with comments written on the review form. The employee signature merely indicates the employee acknowledges the discussion occurred; not that he agrees with the comments. Employees are requested to sign performance reviews but have a right not to sign. The absence of the employee's signature will not affect the validity of the document. If an employee chooses not to sign, the rating manager notes this by writing "chose not to sign" and by signing and dating on the signature line. Do not use "refused to sign" as this connotes coercion.

**Right to Respond.** Employees who receive an unsatisfactory performance review have a right to respond and rating managers must inform them of this right. Such response must come within 7 days of the performance review. Rating managers should consider the response, amend the review as necessary, and attach the response without alteration to all copies of the review (personnel, departmental, and employee copy).

### **Performance Reviews to Document Unsatisfactory Performance**

Unsatisfactory performance results when an employee is not meeting the standards expected for a position. There may be times an employee is not suited for that position but is still an asset to the club and may be suitable for a different role. There are times the employee is not a good fit in any position in the club and should be discharged.

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

1. Conduct a performance review to discuss the unsatisfactory performance. This review should be timely and therefore do not wait for the annual review period. Give specific, objective examples of unsatisfactory work observed by you and other individuals.
2. 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.
3. Meet with the employee regularly during the development plan period to review work, offer support and praise where warranted, and make corrections or suggestions. You should be working together to achieve the desired performance goals.
4. Document all discussions, meetings, changes to the development plan, and keep thorough staff notes during the development plan period.

If the employee rises to the occasion and improves his performance, inform him so. A manager may wish to maintain some sort of modified development plan to continue to monitor the situation for a period. All documentation from the incident should stay in the employee's file in case there are future problems.



## **Performance Reviews for Managers and Supervisors**

For manager and supervisor performance reviews use [PCPM Form 115](#).

### **Instructions for Completing PCPM Form 115**

The manager performance review form is designed to allow rating managers to type in their ratings and review on the computer, as well as printing it and filling it out by hand. The form has major and subordinate goals that can be weighted by the rating manager and space to write comments. Lastly, the form has numerical ratings from below 2.0 (Unsatisfactory) to 5.0 (Exceeds Expectations). The resulting overall score is a weighted average of all rated categories and relates back to a basic rating scale from 0 to 5.

In the same MS-Excel file for each review form is a second tab that allows a rating manager to create a work plan and expectations for the coming rating period.

The form is self-explanatory, but we offer the following tips in using it:

1. After entering the employee and rater's names, enter the weighted percentage (totaling 100%) of the five major goals in the green shaded cells. Under each major goal, enter the weighted percentage (totaling 100%) for each of the subordinate goals in the blue shaded cells.
2. Enter the numerical rating for each goal in the yellow shaded cells using the 0.0 to 5.0 scale in one-tenth increments, i.e., 4.2, 3.6, 2.9. A description of the numerical scale is found on the third page of the form.
3. Rating managers may, at their discretion, modify the existing major and subordinate goals on the review form. They may also delete major or subordinate goals as long as the remaining weighted goals equals 100%.
4. Place the cursor in the white cells and type comments. At the end of any line, typed comments will word-wrap to the next line.
5. The overall performance review score is automatically calculated from entries in the yellow shaded cells and is found under Section 6 on page 2 of the form. Rating managers should also enter "Summary of Performance" comments in the white cell in this section.
6. After holding an initial discussion to explain the performance review process, then filling out and presenting the form to the employee, sign, and date the form on the bottom of page three and provide a copy to the next higher supervisor for review and signature.

Though we have always insisted that a performance review should be a dialogue between the employee and reviewer, we stress again that such a dialogue will greatly improve the review process and encourage the employee to feel appreciated for his or her contributions while "buying in" to any necessary improvements.



**Private Club Performance Management**

**Performance Review—General Manager**

Employee: John Smith

Rater: Bob Jones, Club President

*\*Enter Major Goal weighted % in green shaded cells, Sub Goal weighted % in blue shaded cells, Ratings in yellow shaded cells, and comments in white sections..*

	Weighted %	Major Goals	Rating	Comments	Score	
<b>I.</b>	<b>30%</b>	<b>Board Relations</b>	<b>3.18</b>			
	30%	Communication	3.6	John keeps the board well-informed in an informal way, but communication could be improved by a more formal monthly report.	32%	
	70%	Board Satisfaction	3.0	The board feels that John could do a better job of providing information to the executive committee by keeping them better informed about club operations with an enhanced benchmarking program	63%	
	100%	Must equal 100%			<b>Subtotal Score</b>	<b>3.18</b>
<b>II.</b>	<b>15%</b>	<b>Financial</b>	<b>4.16</b>			
	40%	Revenues	4.5	Revenues this year exceeded all expectations.	27%	
	40%	Expenses	4.0	John's team did a good job of controlling expenses, though the board feels he could establish a more aggressive cost of goods goals for food and beverage.	24%	
	20%	Budget Accuracy	3.8	Budget accuracy could be improved by benchmarking revenues and payroll throughout the operation.	11%	
	100%	Must equal 100%			<b>Subtotal Score</b>	<b>4.16</b>
<b>III.</b>	<b>20%</b>	<b>Membership</b>	<b>3.68</b>			
	25%	Member Satisfaction (Survey Results)	4.2	Members gave good marks to all areas of the club. The challenge will be to keep the scores up as members become more familiar with the number of new initiatives John has implemented.	21%	
	30%	Enrollment	3.2	We must be more aggressive in pursuing the objectives of our membership marketing plan.	19%	
	20%	Retention	3.6	Turnover at the club has been low, though we have had two vociferously unhappy resignations.	14%	
	15%	Quality & Quantity of Communication	4.0	Overall, the communications, both formal and informal, have been very good.	12%	
	10%	Committee Development & Involvement	3.5	John has handled the various club committees well and is very involved.	7%	
	100%	Must equal 100%			<b>Subtotal Score</b>	<b>3.68</b>



**Private Club Performance Management**

**Performance Review—General Manager**

Employee: John Smith

Rater: Bob Jones, Club President

*\*Enter Major Goal weighted % in green shaded cells, Sub Goal weighted % in blue shaded cells, Ratings in yellow shaded cells, and comments in white sections.*

Weighted %	Major Goals	Rating	Comments	Score
<b>20%</b>	<b>People Plan</b>	<b>4.16</b>		
25%	HR, Staffing & Training	4.4	John's prudent staffing plan for seasonal operations has been outstanding and has contributed immensely to the club's bottom line performance.	22%
20%	Safety & Worker's Comp.	5.0	There have been no accidents or injuries at the club this year.	20%
20%	Employee Satisfaction (Employee Survey)	4.0	Club employees rated their satisfaction with the club as a workplace as "better than expected." This is directly attributable to John's leadership.	16%
15%	Development Plans	3.6	John needs to spend more time developing work plans for his subordinate managers so they thoroughly understand expectations for their departments.	11%
20%	Personal Development	3.6	John has put together an excellent personal development plan, but unfortunately due to the long hours he put in this year has not been able to fully pursue it.	14%
<b>100%</b>	<i>Must equal 100%</i>		<b>Subtotal Score</b>	<b>4.16</b>

<b>15%</b>	<b>Operations</b>	<b>3.44</b>		
20%	Clubhouse Maintenance & Cleanliness	3.2	The club facilities are kept clean, though early morning cleanup after major parties could be better. Also, the maintenance staff and effort could stand more organization.	10%
20%	Food & Beverage	3.0	The board wants to see more menu rotation in the main dining room. Also, controls need to be improved in the snack bar and beverage cart operations.	9%
20%	Golf Operations	2.8	We need to put together more imaginative programming for our golf events. Further, pro shop merchandising needs major improvements.	8%
20%	Golf Course Maintenance	4.2	The golf members are quite happy with the condition of the golf course.	13%
20%	Activities	4.0	The activity staff did a great job with summer camp, kid's programs, and the fitness facility and programs.	12%
<b>100%</b>	<i>Must equal 100%</i>		<b>Subtotal Score</b>	<b>3.44</b>

**100%** *Must equal 100%*

<b>VII.</b>	<b>Summary of Performance</b>	<b>Total Score</b>	<b>3.66</b>
<p>Overall, the board is impressed with John's leadership and organizational skills. We do feel that the quality of club operations is inconsistent from department to department and could be improved by holding Department Heads more accountable. Better work planning and instituting a thorough benchmarking system to measure the effectiveness of planned improvement would help tremendously. The board feels there is some room for improvement in certain areas such as golf operations, food and beverage, and facilities maintenance.</p>			

John Smith    1/19/08  
Employee Signature                      Date

Bob Jones    1/19/08  
Reviewer's Signature                      Date

\_\_\_\_\_  
Endorser's Signature                      Date



**RATING SCALE**

<b>4.6 - 5.0 Exceeds Expectations</b>	Accomplishments are unique and superior to the standards for the position. Employee has demonstrated consistent ability to go 'above and beyond' what is expected by creating new ideas and taking the initiative to implement, without direction, impact to areas outside immediate scope of responsibility. Has added new value to projects and serves as a role model and leader for peers to use as a resource.
<b>4.0 - 4.5 Meets All Expectations</b>	Accomplishments demonstrate a sustained mastery of all facets of the position using good judgment and initiative, and producing outcomes that result in a high quality plan. Capable of additional responsibilities with minimal amount of supervision required. Could be recognized as a leader among others.
<b>3.5 - 3.9 Meets Most Expectations</b>	Accomplishes most objectives as outlined with acceptable quality and satisfactory outcomes. Doing a good job, and could require some additional development to achieve results of higher quality and innovation.
<b>3.0 - 3.4 Meets Minimum</b>	Accomplishments meet some objectives with minimum acceptable quality and outcomes. Additional direction and development is required to improve performance in all areas of accountability to achieve acceptable expectations.
<b>2.0 - 2.9 Below Expectations</b>	Accomplishments meet some goals, but do not achieve the key requirements to reach minimal expectations. Additional effort is required to result in meeting expectations and improving beyond the minimum. Requires direct counseling and a detailed development plan for improvement. Failure to improve or correct the overall performance within the next review period will result in prompt termination of employment.
<b>Below 2.0 Unsatisfactory</b>	Has not accomplished any goals or objectives, even with close supervision. Failure to improve or correct the overall performance immediately will result in discharge.



## **Performance Reviews for Employees**

For employee performance reviews use [PCPM Form 114](#)

### **Instructions for Completing PCPM Form 114**

The Employee Performance Review form is designed to allow supervisors to type in their ratings and review on the computer, as well as printing it and filling it out by hand. The form provides four numerical ratings from Unsatisfactory (1) to Exceeds Expectations (4). The resulting overall score is an average of all rated categories and relates back to a basic rating scale from 1 to 4.

On the third page there is space to enter goals for the coming rating period, as well as a place for recording an employee's impression of the level of training, resources, and support we provide them to do their jobs properly.

We believe the form is self-explanatory, but offer the following tips in using it:

1. After entering the employee's name and other information, you may select the type of review and employee's employment status by circling or highlighting the correct entry, for example, *Introductory* and *Full Time*.
2. When selecting the rating for individual rating criteria, simply double-click on the check box you want. A window will appear with a place to "Check" the block. After clicking OK, the box will appear checked. Do this for all rating criteria you wish to rate. If you check the wrong box or wish to change your rating, double-click on the previously selected box and change the box to "Not Checked."
3. If you are unable to score any rating criteria, check the N/A block.
4. Place the cursor in any comment field and type your comments. At the end of any line, your typed comments will word-wrap to the next line. The box will also expand vertically as necessary to hold lengthy comments.
5. On the top of page 3 is a place to enter the employee's overall rating. Simply divide the total score of all rated criteria (not including N/A's) and divide it by the number of criteria rated. Enter this score in the appropriate space.
6. After holding an initial discussion to explain the performance review process, then filling out and presenting the form to the employee, sign and date the form on the bottom of page three and provide a copy to your general manager for review and signature.

Though we have always insisted that a performance review should be a dialogue between the employee and reviewer, we stress again that such a dialogue will greatly improve the review process and encourage the employee to feel appreciated for his or her contributions while "buying in" to any necessary improvements.



**Private Club Performance Management**

**Employee Performance Review**

<b>Employee Information:</b>				
Name: <b>Emma Sweet</b>	Review Type: <i>(circle one)</i>	<b>Introductory</b>	<b>Annual</b>	<b>Discretionary</b>
Job Title: <b>Server</b>	Employee Status: <i>(circle one)</i>	<b>Full Time</b>	<b>Part Time</b>	<b>Seasonal</b>
Department: <b>Food &amp; Beverage</b>	Supervisor:	<b>Brad Jones</b>		
Review Period From: <b>1/1/07</b>	To: <b>12/31/07</b>	Date:	<b>1/15/08</b>	

<b>Ratings</b>	1 = Unsatisfactory	2 = Below Standard	3 = Meets Expectations	4 = Exceeds Expectations	N/A = Not Applicable
<b>Job Performance</b>					
1. Understands and completes all assigned duties	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Quality of work (consider accuracy, thoroughness, timeliness)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Quantity of work, productivity	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Abides by standards, policies, and procedures for position	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Makes sound decisions relating to work	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Works well with others	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Completes assignments cheerfully and promptly	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Works well without supervision	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Is employee a team player, assisting others when necessary?	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Communication skills with supervisor and co-workers	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Engagement with members (outgoing, friendly, courteous, helpful)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12. Makes good decisions independent of supervisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. Takes ownership, accepts responsibility for actions	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. Leadership ability, others look up to as a leader	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
15. Takes care of club property and equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
16. Has an "eye for the business," attention to details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments: Emma is very good with members. She judges their desire for engagement perfectly and charms them with her outgoing personality. Sometimes her focus on interacting with customers can detract on her focus on details.</i>					
<b>Initiative</b>					
17. Is proactive and self-motivated, performs tasks without being told	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
18. Anticipates members' needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19. Offers ideas for improvement, searches for ways to better the operation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments: Emma's excellent service ethic has developed into an almost sixth sense of anticipating members' needs.</i>					



<b>Ratings</b>					
	1 = Unsatisfactory	2 = Below Standard	3 = Meets Expectations	4 = Exceeds Expectations	N/A = Not Applicable
<b>Attitude and Temperament</b>					
20. Pride in self (carriage, walks with purpose, good eye contact)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21. Pride in workplace, picks up and cleans as goes	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22. Respect for and courteous to others	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23. Enthusiasm about job, the club, and providing service	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24. Displays a positive, contagious attitude	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25. Acts professionally, displays good manners	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26. Handles stress well, is calm "under fire"	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments: Emma is very direct and makes excellent eye contact when speaking with members, guests, and co-workers. She does tend to get stressed out when we are very busy.</i>					
<b>Appearance</b>					
27. Neat, clean appearance (hair, hands, nails, oral hygiene)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28. Professional appearance in dress or uniform	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29. Wears nametag as required	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30. Displays good posture and is aware of poor body language	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments: Emma has forgotten her nametag on three different occasions.</i>					
<b>Attendance</b>					
31. Comes to work as scheduled (consider all absences)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32. Follows proper call-in procedures	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
33. Flexibility and availability for schedule changes	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments:</i>					
<b>General</b>					
34. Appreciation and understanding of the club culture	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35. Keeps management informed of issues, problems, emergencies	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36. Keeps promises, honor commitments, is dependable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
37. Other: <b>Acts as hostess on occasions</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
38. Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39. Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40. Other:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Comments: Emma is very dependable and true to her word. Emma has on occasion filled in as hostess and has done a superb job in that position.</i>					





Private Club Performance Management

Employee Performance Review

Name: Emma Sweet

Overall Rating: 3.06

*Total Score divided by number of items rated (not including N/A's)*

<b>Evaluation</b>
<p><b>PERFORMANCE SUMMARY:</b></p> <p>Overall, Emma is a solid performer who can be counted on to do her job well. Her greatest strength is the way she interacts with members. We routinely receive positive comments from customers about her performance.</p>
<p><b>GOALS:</b> <i>(as agreed upon by employee and supervisor)</i></p> <ol style="list-style-type: none"> <li>1. Make more of an effort to remember to bring her nametag to work with her.</li> <li>2. Be more focused on the details of her position.</li> </ol>
<b>Support</b>
<p><b>Do you feel you are provided all the necessary tools, training, resources, and support to do your job properly, yes or no? If no, what could be improved?</b></p> <p>Emma feels that the club should add classes on stress management.</p>

<b>Verification of Review</b>
<i>By signing this form, you confirm that you have discussed this review in detail with your supervisor. Signing this form does not necessarily indicate that you agree with this evaluation.</i>

Employee Signature: Emma Sweet Date: 1/15/08

Reviewer Signature: Brad Jones Date: 1/15/08

General Manager Signature: Mary Robinson Date: 1/17/08



## **Conclusion**

While preparing work plans and conducting meaningful performance reviews can be time consuming for rating managers, they contribute greatly to a more focused and high performing operation, particularly when rated individuals are fully aware of their boss's expectations for the position. For the rated employee they provide an understanding of expectations and useful feedback on performance. For the rating manager they give an opportunity to raise performance levels with specific work plans, while guiding and coaching a subordinate's conduct and work performance.

Work Planning and Performance Reviews are part of the ongoing communication process between managers and employees and may also be considered an essential part of employee training and performance management, in that they give direction and goals for future periods, while providing meaningful feedback for past performance. The time and effort put into both will enhance the productivity and performance of club operations at all levels, but only in direct proportion to the effort put into them by managers.

## **Additional Resources**

- [What I Expect from My Club Management Team](#)
- [Infographic – The 3 Cycles of Performance Management](#)
- [PCPM Club Forms](#)

*About the Author*

Ed Rehkopf is a graduate of the U.S. Military Academy and received a Master 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.