



**Private Club
Performance Management**

Employee Development and Discipline on the Go



Ed Rehkopf

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#06

Departmental Staffing Guides

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

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

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

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

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

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

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



#21

Performance Review Principles

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

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

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



Training on the Go

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

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

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

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

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

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



#34

Common Disciplinary Problems - Misconduct

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

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

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

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

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

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



#39 *Conducting Counseling / Disciplinary Sessions – 2*

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

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

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

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

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



Discharges

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

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

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

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

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

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

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



#56

Give Them More Than Just a Paycheck

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

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

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

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

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

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

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

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

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

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



The 100/0 Principle

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

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

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

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

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

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



#59

Record of Employee Counseling, FM-103

Private Club Performance Management

Record of Employee Counseling

Name: _____ Date: _____

Department: _____ Supervisor: _____

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

Date/Time of specific actions or omissions listed below:

Subject (discuss specific actions or omissions in detail):

(Continue on blank sheet, if necessary)

Employee's Comments:

(Continue on blank sheet, if necessary)

Proscribed Corrective Actions:

(Continue on blank sheet, if necessary)

Time Allowed for Corrective Action(s):

- ☐ Written Notice ☐ First Written Warning ☐ Final Written Warning
☐ Further disciplinary action, including discharge will be taken if corrections are not made within time allowed.

Employee's Signature

Date

Supervisor's Signature

Date

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

Management Review

Date

About the Author

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