NEWLY-HIRE MANAGER’S CHECKLIST

As the Club’s new Manager (CM, GM, COO, CEO, etc.) you might know next-to-nothing about your new Club. The checklist below is intended to help you learn about the Club and assimilate into the Club and the community as quickly as possible. Because the services and facilities of every club vary, it isn’t possible to make a one-size-fits-all list, but this will give you a start. If you have any questions, or suggestions, please feel free to reach out to John Kinner at John.Kinner@gmail.com or 862-246-4365. I’d like to hear how I can improve the list and what your experiences with it were.

The items that are in bold type should be a priority, with a goal of completing them in the first 30 days.

Twenty-One reminders of things you already know:

1. Assimilate and earn trust before making any changes. Unless a situation is urgent (or immediate change is expected by the Board), there is rarely a reason for a new GM to make changes in their first 90 days.

2. Be Present. Consistently practice Good Eye Contact, Member (and employee) acknowledgement, Engaged Demeanor, Sincere Greeting, Active Listening, and Participatory Teamwork. Nobody is more important than the person in front of you at that moment.

3. Communication… Everything you do involves communication which is and has to be TWO-WAY. It requires feed-back and give-and-take. You will create an environment in which communication is either encouraged or inhibited… choose wisely.

4. Reward and encourage INNOVATION. Create an organization that is customer-focused, flexible, and responsive to trends and changing preferences. Allow employees to make mistakes. Failure is another opportunity to succeed.

5. To the extent possible, involve everyone in everything. Raise the employees’ commitment through on-going involvement. “Tell me and I will forget, show me and I may remember, involve me and I will understand and embrace.”

6. Manage, lead, and work by example. The speed of the captain determines the speed of the ship.

7. Be visible and present (see no. 2.), and practice management by wandering.

8. Create a sense of immediacy, i.e., DO IT NOW.

9. Practice and demand total integrity, fairness, kindness, and respect.

10. Display positivity at all times. Your behavior and demeanor are contagious: make sure they are the behavior and demeanor you want everyone to catch.

11. Seek, and publicly reward the right behavior. Thorndike’s Law: “Behavior rewarded will be repeated.”

12. Support your employees. If you want your employees to create a superior environment for your members, you have to create a superior environment for your employees. You can’t have happy members if you have unhappy employees.
13. Coach daily. Don’t wait for an annual review to let your team members know how they are doing.

14. Train, train, train, and re-train. It is an ongoing and never-ending process.

15. Hire, empower, and retain great people. Look for people who bring talents to the table that are different from yours.

16. Continuously seek improvement in yourself and in the Club.

17. Anticipate. Consider what can go wrong and prepare for it.

18. Respect the Board’s authority. You might have the most knowledge and experience, but the Members own the Club and the Board represents the members.

19. Respect the Club’s traditions.

20. Develop a GM Calendar which will provide you with month-by-month reminder for the various deadlines and important dates (Annual Meeting Notice, Staff reviews, Tax filings, Insurance renewals, etc.)

21. Maintain a healthy balance between family, self, and work.

GOVERNANCE

— Read the articles of incorporation. If you can't find them, request a copy from the Secretary of State
— Read and understand the Bylaws. Make a note of concerns, deadlines for meeting notices, and questions. When was the last revision made? If it has been more than 5 years, recommend to the Board a comprehensive review
— Read and understand the Board Policy Manual (defines the roles and responsibilities of all the participants in the club's governance). If one doesn't exist, its creation should be a priority.
— Study the Strategic Plan, it is the roadmap the club has created for its future. Inquire regarding the process for its development… was it top-down or based on member input and data? If one doesn’t exist, its creation should be a priority.
— Read and understand the Member Handbook (club rules)
— Meet with every Board member and Committee Chairman individually to establish rapport and learn about their concerns and goals
— Meet weekly with the Club President to get their perspective on your progress towards understanding the Club and the Board’s priorities
— Review the Club’s Policy Compilation (10+ years of policies drawn from the Board minutes, in a searchable format)
— Review the Board meeting minutes for the last two years
— Review the organizational structure
— Attend every committee meeting
— Produce and distribute a Board Update bi-weekly to inform the Board of your ongoing activities and observations.

HUMAN RESOURCES

— Schedule tours with each of the department managers so they can show you the areas of the Club they are responsible for and you can learn from them first-hand what their needs, goals, and priorities are. Be sure you see the back-of-the-house and out-of-the-way areas such as:
o On course rest rooms
o Chemical storage
o Pool pump room
o Building boiler room
o Attics and storage areas
o Electrical rooms
o Employee break rooms and rest rooms
o Cart storage
o Etc…

— Conduct a club-wide employee meeting
— Hold weekly Department Manager meeting
— Read the employee handbook. When was the last time it was updated? If the last update was more than a year ago, a comprehensive review should be a priority.
— Meet with every employee individually. Consider a written query that you ask them to complete in advance of your meeting and that you will provide to them in advance with your answers to questions such as:
  o Tell me about your family
  o Where do you live
  o How long have you worked here
  o Who do you report to
  o Do you like your job
  o What do you like best about working here
  o If you could change one thing about the club and/or your job, what would it be?
— Quiz the HR/PR associate, Controller, and other employees to learn if:
  o There are any “Unwritten policies” regarding HR
  o The policies in the handbook are consistently adhered to
  o There are any current employees who did not pass the background check or drug test
— Review payroll records to observe overtime, vacation accruals,
— Review the files of 10-20% of the employees to see if they are complete:
  o I-9 properly completed
  o Application completed and signed
  o W-4
  o Evaluations
  o Job Description signed by employee
  o Employment agreement signed
  o Employee handbook receipt signed
  o Sexual Harassment Policy signed (required by some states)
  o Working papers (under 18 years of age)
  o Background check reports and/or drug test results
— Reach out to local managers and/or to the Club’s labor attorney to identify what state laws and regulations exist for on-boarding new employees
— Secure a copy and read the state’s Department of Labor Standards
— Review the evaluations and goals for all department managers
— Review the employee insurance programs with the Club’s Agent
— Review the 401(k) with the provider/advisor
— Review all employee orientation, on-boarding, and training materials and programs

**FINANCIAL**

— Review the last 6 months’ financial statements (statements of position and statements of activity), looking for patterns, anomalies, and variances
— Review the current year’s budget
— Review and understand the terms of the Club's debt instruments (mortgage, equipment and vehicle leases, line of credit, membership bonds, refundable initiation fees, etc.)... Are deadlines nearing?
— Participate in all food, beverage, and chemical inventories to verify their accuracy
— Review all contracts (linen, waste removal, HVAC, fire suppression, kitchen hood cleaning, geese control, pond services, knife sharpening, snow removal, grease trap cleaning, etc.) and make a note of active and passive renewal dates.
— Review the last 3 years audited financial statements and pay particular attention to the notes
— Review the Club’s retirement accounts. Are there under-funded liabilities?
— Review the Club’s Capital Reserve study. If one doesn’t exist, its creation should be a priority
— Review the Club’s long term facilities plan
— Calculate the Club’s available cash sources and uses following the Club Benchmarking Available Cash Business Model for private clubs
— Have compiled (if it doesn’t already exist) a spreadsheet comparing the results of the audited financial statements from the last ten years (or longer)
— Review the Club’s chart of accounts
— Review the Club’s most recent 990 Filing, reading and understanding every question and answer and performing research where needed
— Meet with the Club’s banker to establish rapport and learn of the Club’s history with the bank and opportunities and/or challenges
— Meet with the Club’s landlord (if there is one)
— Have a china, glass, and flatware inventory conducted and spot-check for accuracy
— Review pricing policies and verify compliance for food, beverages, and pro shop merchandise.
— Verify dues reconciliation
— Review accounts receivables procedures and current AR aging

LEGAL

— Know what reports, filings, inspections, licenses, and permits are required and when you must submit or renew them
  o Liquor
  o Food (health, victuallar’s, etc.)
  o Dance and/or entertainment
  o Open Space (typical tax reduction provided by the state and local governments to maintain open space)
  o DEP
  o 5500 Tax return (for your 401(k)
  o 990 Tax return
  o OSHA posting
  o ASCAP
  o Backflow preventer inspection
  o Elevator inspection
  o Fire suppression (hood, sprinkler, fire extinguishers)
  o Pesticide applicators’ licenses
  o Fuel Tank inspections/permits
  o Aquifer/well-water use records
  o Hydraulic lift certificates
  o Pool registration
  o Pool water quality records
— Inquire of the Staff and the Board if there are any recent, active, pending, or potential legal actions involving the Club
— Inquire about member suspensions and expulsions in the last 3 years.
— Inquire about employee claims made to supervisors, the Board, attorneys, and/or state agencies in the last 3 years
— Verify that all required posters are posted.

SAFETY AND SECURITY

— Review the Club’s Disaster and Emergency Response and recovery manual
  o Life protection
  o Property protection
  o Document retrieval
  o Aggressive intruder response
  o Public comment responsibility
— Research with the local health department to understand what certifications your staff needs
  o ServeSafe (food handlers)
  o Alcoholic beverage service
  o Food Allergen
— Review the Opening and Closing manager’s checklists and reports
— Review data backup and recovery procedures
— Review CORI reports for employees who need them
— Review the Club’s insurance programs with the Club’s Agent, including motor vehicle, Property and Casualty, and Directors and Officers. Ask the agent where the Club currently has vulnerability (wind damage deductible too high, cyber coverage, flood coverage, business interruption, etc.)
  o Inquire about claims from the last 5 years
— Invite your insurance carriers loss prevention expert to do a club-wide inspection
— Meet with the local fire marshal/inspector and review the latest inspection to understand violations and potential hazards
— If the club provides any child care, review state regulations and/or meet with local authorities (Department of Public Health?)
— Review AED & First aid training records
— Review employee safety training orientations for each department
— Review key issuance records (who has what keys)
— Review security system access codes list and procedures with the Director of Security or Contractor
— Review the security of Member and Employee records

CULTURE

— Focus on the prime times and be there:
  o First tee/golf shop on weekend mornings and tournaments
  o Pool registration area during high use/arrival periods
  o Paddle courts on league nights
  o Tennis courts at clinic times and tournaments
  o Grill room at lunch
  o Dining room at dinner
  o Exercise studio during arrival periods before classes begin
— Offer members opportunities to meet and talk to you, e.g.:
  o Open House/Reception
  o Happy hour (offer free food and conversation… be creative)
  o Invite contingent representatives for small luncheons (coffees, cocktails, breakfasts, dinners) (6-8 people), e.g., retired members, women golfers, low-handicap players, frequent fitness users
— Read Club History book (if one)
— Read the last 12 months of newsletters
— Review most recent member and employee survey results
— Interview all past presidents
— Interview the club historian (might be an unofficial position)

MEMBERSHIP

— Have the Membership Director give you a candidate tour
— Review the new member on-boarding/enrollment process and time-line
  o What and when… required materials
  o Posting of candidates
  o Membership/Admissions Committee approval
  o Board approval
  o Invitation
  o Orientation
  o Assimilation and engagement program
— Review current membership report
  o Current prospect list
  o Tracking reports
— Review the 10-year trends of
  o Number of Members in each classification
  o Attrition
  o Enrollment
  o Dues rates
  o Initiation fee rates
  o Average Members’ age
— Review membership reports for the last 12 months
  o Number of prospects
  o Number of tours
  o Number of applications/candidate information forms distributed and returned
  o Number of new members
— Review all membership promotional materials including
  o Brochures
  o Applications/candidate information forms
  o Sponsor forms
  o Website materials/forms/videos/photos, etc.

COMMUNITY

— Meet with the home-owners association (if there is one)
— Meet with the local administrator (town manager, town administrator, mayor)
— Meet with a few abutters and neighbors (or call to introduce yourself and give your contact information)
  o Often the Director of Grounds knows who these people are and who you should reach out to
— Reach out to the local Chamber of Commerce (some clubs do not want to join the local chamber, some do)
— Invite the GM’s of local clubs to lunch
— Arrange for tours of the other local clubs, including the Y, swim clubs, racquet clubs, and for profit clubs
— Ask the staff and members what their favorite local restaurants are and dine there