15.

Board Training, and Development
D. Other Tactics for Enhancing Effectiveness

1. Providing Extensive Orientation

Throughout this guide, we have suggested methods that can enhance the ability of boards and individual directors to excel. The most important aspect of the process is getting a new director off to a good start. Orientation is equally important for all committees.

Orientations are meetings, or a series of meetings, that introduce the new members to the board or committee. These can help volunteers make a successful transition from neophyte to contributor. How can board and committee orientations help members understand their responsibilities?

- They set forth a clear role for new board and committee members.
- They can help secure the future of the club.
- They can provide new members with the materials they need to govern effectively.
- They can shorten the learning curve of new members and help them more quickly become productive members.
- They can help new members understand what is and what is not expected of them.
They can give current members, board or committee leaders and the GM/COO a chance to welcome the new members and to share their collective knowledge.

**What Do Orientations Accomplish?**

One GM/COO said his orientations help make sure that all committee members are reading from the same sheet of music so that the first meeting won't be a "discordant cacophony of competing scores."

Successful club orientation is not very different from the orientation new employees receive. Like new employees who have been through interviews and have researched their new employer, new board and committee members may have some idea of what they're getting into. After all, they've probably been club members for some time. However, without adequate orientation, the new board and committee members will lack the essential knowledge of what the club's mission is and what role they are to play in fulfilling that mission.

The upfront attention of an orientation can well determine whether the board or committee is a productive, energetic one that contributes to the success of the club, or one that merely meets according to schedule and carries out only the status quo.

According to successful club orientation planners, the best orientation program must meet the unique needs of the club. The message communicated to new members during orientation sessions will be the unique message of a particular club. It will speak of the personality, the mission and the objectives of the club, its boards and its committees. The orientation session can range from a short, restrained meeting to a glitzy, multimedia presentation. However, after it is done, new members should walk away with a clear vision of their role and their responsibilities.

It is clear why a club should orient new directors. Another way of expressing the point is to consider the following points:

- Orient to bring new members up to speed.
- Orient to build loyalty and enthusiasm.
- Orient to communicate the club mission.
- Orient to teach policies and procedures.
- Orient to define informal and formal networks.

Orientations, as noted earlier, can take several different formats. The format often depends on the size of the board or committee, how frequently it meets, how many new members are being inducted and what the style of the board or committee is.

The type and amount of information that needs to be passed along will also dictate the activities planned for an orientation. An orientation planner should select the most effective techniques and activities to communicate the club's board or committee needs.

Orientations, no matter what their format, should always be time-efficient, effective and useful. Whenever possible, they should also be entertaining. Plan carefully to make sure the orientation meets these objectives. The following sections can help determine what will work best for a club's orientation.

Some common activities to include in an orientation are:

- Tour of club;
- Discussion/overview session;
- Meal;
- Slides or media presentation;
- Panel discussions;
- Distribution of printed materials;
- Question/answer session;
- Board or committee meeting;
- Follow-up actions.

**Mandatory Attendance**

Too often, a new director will try to bow out of the orientation meeting due to a scheduling conflict. It must be made perfectly clear to all candidates, prior to the election, that attendance at the orientation meeting is mandatory. Set the date for orientation well in advance of the election so that each new member can adjust his/her schedule accordingly.

Periodically, a candidate may have a conflict that cannot be adjusted (wedding, overseas vacation). For such cases, there needs to be a back-up date selected that is at least two weeks from the original one. Normally, preparing well in advance with alternatives will ensure attendance.
The Board Resource Manual
The club should provide each member with a package of orientation materials. Some clubs already have developed their own orientation books. Others, however, do not have a prototype reference manual for orientation and just offer an individual package of separate materials. As a supplement to this guide, we have provided the club with a sample board resource manual. The manual includes sections on:

- Club Organization;
- Finance and Budget;
- Personnel;
- Legal/Insurance;
- Club Use;
- Membership Strategic Planning;
- Resource Material;
- Other Related Materials.

Each section has smaller tabs for targeted information. The manual offers a format for club management in preparing all the necessary information that will be needed for a new director.

The resource manual can also be a permanent reference book for directors to be used throughout the year. The book can be carried home by a director or kept on site and made available at each meeting along with the normal current information package.

Practice # 59—The club will hold mandatory orientation meetings for new directors and committee members annually.

2. Fund Board and Staff Training

It is commonly understood that advance training can improve effectiveness. Companies are continually offering new educational opportunities for their executives and all levels of employees. They do this so that the employees can stay abreast of the latest techniques affecting their businesses. Continuing education and training is an important tool to remain competitive in the marketplace.

Most of the education targeted at club management is provided through professional associations. GMs, superintendents, golf pros, tennis pros, athletic directors, pool managers, chefs, human resources managers, business managers, maintenance engineers and banquet coordinators all have associations that have some educational component attached to them. These associations do a good job in identifying industry needs and then offering targeted programs addressing those needs.

It would appear that if the club were to pay for the dues and expenses to all these associations, it would result in a major annual expenditure. It is common for corporate America to invest 1 percent or more of their annual budget in training. For a $3M club, this would equate to $30,000 annually rising as the gross dollar volume increases. It would certainly be realistic to expect that funding these associations would not cost $30,000 per year.

If a $3M club generated half of its income from dues, then the $30,000 in education funding would equate to 2 percent dues increase. Although subjective in nature, we could assume that this type of investment should make the club much better overall and probably save that 2 percent in efficiencies generated from the education. Certainly this would be a win-win situation for the club.

It is also prudent to expect that club boards need continuing education. This is especially true due to the fact that clubs are unique businesses. Unpaid volunteer leaders seldom come to the board with a thorough understanding of the nature of the business. Although orientation helps bring directors up to speed, there should also be an education process in place so they can become better.

Resources to educate club boards are varied. Certainly this guide, provided by Premier Club Services®, is one example. There are associations specifically for clubs, as well as a variety of publications and resource materials available on a regular basis. Club directors should take advantage of these resources. The GM/COO should be charged with the task of reviewing resource materials and ensuring that they get into the hands of all directors.

Practice # 60—The club will encourage participation in professional associations and make funds available for continuing education, training and resource materials for the club staff and the board.
3. Learn From Successful Organizations

Club executives are part of a close professional network. They are amenable to sharing information regarding successful ideas, as well as discussing problems they face, while looking for possible solutions from other executives they respect. This can be a major asset to clubs leaders as they deal with difficult issues.

Although each club is unique unto itself, clubs have enough similarities that they can learn from the experiences of each other. The GM/COO should be encouraged to stay current with what is happening locally and nationally. This information may be vital to discussions as they occur at board and committee meetings.

GM/COOs can also assist in another way. They can provide opportunities, through their relationships with other GM/COOs, for club leaders to visit other clubs, participate in golf competitions or participate in socials with other club leaders. Round-table discussions with small groups of club leaders, with similar issues, can pay real dividends by helping generate solutions to nagging problems.

This type of activity can also help boards stay ahead of the curve regarding new services. You can be sure that club members will be visiting other clubs and coming back with suggestions formed with the argument, "Why can't we do what is done at XYZ club?" Knowing what is happening around you is critical to staying one step ahead of what may become new membership demands.

Experiencing other clubs may also ignite new creative ideas that can be implemented at your club. Remember that good governance is about progress. Why not be the club that others copy, rather than always trying to catch up with the competition?