

**Club Resources**  
INTERNATIONAL

**Work Planning  
and  
Performance Reviews**

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### Work Planning for Exempt Employees

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 club 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, and establishing “stretch” work plans. Though it is initially time-consuming to do so, developing club department heads into strong leaders and managers will allow the club to routinely function at high levels and the General Manager to focus on long-range matters and strategic issues.

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:

1. Preparing detailed, formal Work Plans with timelines and milestones for each department head.
2. Requiring department heads to prepare departmental goals and plans for their departments.
3. Ensuring that department heads benchmark their operations to provide objective measures of progress.
4. Giving honest performance reviews based upon measurable, objective criteria.

When the General Manager takes the time to develop 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.

### Procedures

The General Manager should use the Manager Performance Review, CRI Form 115 Series of forms to develop department head Work Plans. The second tab of this form allows the Rating Manager to establish goals for each major and subordinate goal (see next page for example). For more complex goals, the General Manager can require the department head to prepare an Action Planning Sheet, CRI Form 136 (example on page 4), that will lay out the necessary steps to complete the 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 (Accounting Policy, A-2506) 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.

### Club Resources International

### 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.</b>	<b>20%</b>	<b>Board Relations</b>
	40%	Communication
	60%	Board Satisfaction
	100%	Must equal 100%
<b>II.</b>	<b>25%</b>	<b>Financial</b>
	40%	Revenues
	40%	Expenses
	20%	Budget Accuracy
	100%	Must equal 100%
<b>III.</b>	<b>20%</b>	<b>Membership</b>
	25%	Member Satisfaction (Survey Results)
	30%	Enrollment
	20%	Retention
	15%	Quality & Quantity of Communication
	10%	Committee Development & Involvement
	100%	Must equal 100%

### Club Resources International

### 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
20%	<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>	
100%	<i>Must equal 100%</i>	

15%	<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>	
100%	<i>Must equal 100%</i>	

100% *Must equal 100%*

#### VII.

Summary of Performance
<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

### Club Resources International

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

Dates of intermediate reviews: <i>Keep GM informed of progress at monthly review of financial statements.</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 Non-Exempt Employees

While not as critical as preparing work plans for managers, it is sometimes useful to prepare an Employee Development Plan, CRI Form 116, for an employee who shows either great 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 Non-Exempt Employee Performance Review, CRI Form 114, to ensure he understands the job requirements and how he'll be rated. After all, you can't expect anyone to know what is expected of him or what you will rate him on unless you share that critical information with him.

### 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 part of the ongoing training effort of the club.

- 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] for more information. 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 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 club satisfaction with his 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.

**Types of Reviews** – The club uses three types of performance reviews:

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. This is particularly important for management hires. 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 contain:

- A candid conversation regarding the individual's work performance based on an objective assessment.

- A development plan to improve in 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, he/she must document the areas of unsatisfactory work performance and have prior approval from the General Manager. A Notice of Extended Introductory Period, [CRI 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 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 Personnel Administrator.

2. Annual review – These reviews are for all employees once a year during the month of January. 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, and 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 how they will be rewarded for their performance. 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 Personnel Administrator.

3. Discretionary review – These reviews are optional. Any time a rating manager feels the need to document an individual's performance he or she may do so by using a 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 for employees:

1. The Exempt Employee Performance Review, [CRI Form 115 Series]. Individual forms have been designed for the General Manager and for each department head position and can be found under "Forms" on the Club Resources International website.
2. The Non-Exempt Employee Performance Review, [CRI Form 114], used for all non-exempt 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 particular position according to the same standard.



Completed Performance Review forms will be signed by the rating manager and the employee. 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 Personnel Administrator for inclusion in the employee's personnel file. Further, rating managers are responsible for preparing an Employee Development Plan, CRI Form 116, when necessary.

2. Personnel Administrator – The Personnel Administrator is tasked with responsibility for overseeing and administering the club's Performance Review Program. She will also monitor rating managers' compliance with the schedule and adequacy of reviews and report any problems to the General Manager.

The 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. The Personnel Administrator is also responsible for filing the completed review form in the individual's personnel file.

3. Review and Endorsement

Performance reviews for exempt employees 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 in conjunction with the Board of Directors.

Performance reviews for non-exempt employees will be completed by their supervisor or department head and endorsed by their department head or General Manager, as appropriate.

### The Performance Review Process

The purpose of any performance review is to obtain the best possible performance from each employee by positively reinforcing desired behaviors, while developing him to his full potential by coaching him 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.
- To coach along the way, correcting when necessary and reinforcing positive performance.
- To ensure that any performance review is not a monologue by the rating manager; rather it should be a dialogue between the employee and rating manager to reach a mutual understanding of what optimum performance is.
- To set goals to accomplish prior to the next session and discuss how to accomplish them.

Prior to any performance review, whether Introductory, Annual, or Discretionary, a rating manager must explain to an employee the criteria by which his performance will be judged. This is only fair, as everyone deserves to know the important aspects of their jobs. The perfect time to share and explain the Manager Performance Review form is upon hiring when the rating manager provides the employee a job description and explains the job functions of the position.

### 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. This practice of self rating 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 are in agreement 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 Performance Review

Performance reviews are only as meaningful and useful as the effort put into them by the rating manager. The following guidelines are provided to help rating managers understand the basic requirements for conducting meaningful performance reviews.

#### Preparation.

- Prepare for the performance discussion. Schedule a quiet place, make sure you have enough time, and don't allow interruptions.
- Fill out the performance review form accurately and objectively using information gathered from Staff Notes, recollection of events, Records of Employee Counseling, as well as comments from other club leaders and members. Be thorough. Use additional sheets of paper as necessary.
- If necessary or desired, fill out an Employee Development Plan, CRI Form 116, detailing specific goals to be accomplished. In the case of a non-exempt employee, the rater should use the work plan tab in the CRI Form 115 file.

#### The Discussion

- Set the tone of the discussion during the meeting by restating the objectives and the role you and the employee will take in the discussion. Be informal, make the employee feel comfortable, offer a beverage, and make sure you will not be interrupted.
- People want to know what the score is. Start by telling them the overall score of the review. Explain that the score may change as the dialogue progresses. The rest of the review will then focus on the elements that make the score. If they know the score up front, they are more likely to participate and listen to what you have to say.
- During the discussion be candid, sincere, and listen to the employee. Encourage a dialogue. The more an employee talks, the more he will remember and understand his part in the process.
- Be open to changing any of your criteria ratings if the employee provides 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.
- The performance review is 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.
- Finalize the discussion by setting expectations and laying out specific goals to accomplish prior to the next time you meet.

**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.

**Right to Respond.** Each employee who receives an unsatisfactory performance review has 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 if warranted, 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 particular position. There may be times an employee is not suited for that position but is a valuable asset and may be able to work in a different role. There are times the employee is not a good fit in any position at 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 you 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, CRI 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 rating manager may wish to maintain some sort of modified development plan to continue to monitor the situation for some period of time. All documentation from the incident should stay in the employee’s file in case there are future problems.

If the employee is unable to meet performance expectations, discharge or reassignment will occur. For more information, see Discharge, P-700.05.

### Performance Reviews for Exempt Employees

Exempt employees include department heads and other designated managers and supervisors. See [Exempt Employees], P-400.06, for more information.

#### Instructions for Completing CRI Form 115

The Exempt Employee 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 more 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 and 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, alter the existing Major and Subordinate Goals on the review form. They may also delete Major or Subordinate Goals so long as the remaining weighted goals equals 100%.
4. Place the cursor in the white cells and type your comments. At the end of any line, your typed comments will word-wrap to the next line.
5. The overall performance review score is automatically calculated from your entries in the yellow shaded cells and is found under Section 6 on page 2 of the form. Rating managers may also enter a "Summary of Performance" 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.

### Club Resources International

### 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>

### Club Resources International

### 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>	Must equal 100%			<b>Subtotal Score 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>	Must equal 100%			<b>Subtotal Score 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

Club Resources International

Performance Review – General Manager

### 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 Non-Exempt Employees

Non-exempt are those employees who are paid overtime for any hours worked over 40 in a workweek. They are generally referred to as hourly employees, though some salaried employees will qualify for payment of overtime and are classified as non-exempt employees.

#### Instructions for Completing CRI 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 and 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 club, employee name, and other employee 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 rate any particular 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 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.

### Club Resources International

### 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 and guests. She judges their desire for engagement perfectly and charms them with her outgoing personality. Sometimes her focus on interacting with members 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 club	<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>					

Ratings					
	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 have a tendency 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's 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>					

Club Resources International

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 manner in which she interacts with members and guests. We routinely receive positive comments from members 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>
<p><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></p>

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

### Club Resources International

### 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.

### **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. 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, 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.