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The Vital Process of Onboarding for Boards and Staff



BOB JAMES

Much has been published over the decades about club orientation programs for staff governance leadership. The importance of both cannot be understated, but orientations are only part of the bigger picture of how to onboard new staff members, committee chairs and directors. We direct this article to management and board leaders as there are significant similarities between what a good onboarding process should be for both categories of newbies.

More employees quit after their first day than at any other time in their careers. A recent publication by BambooHR reports that one in four (23%) employees will cry within their first week on the job, and a full 44% regret their decision to accept their position after their first week. This sounds like an orientation problem. However, they also reported that you have just 44 days on average to influence an employee's decision to stay long-term.

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Orientation is only the first step in onboarding a new employee. Organizations must get the employee off to a good start, but the next week, month and longer will influence whether an employee will become permanent. The publication also reminds us that employee turnover typically costs \$7,500 to \$28,000 per new hire. In addition, management expends considerable time and effort in the hiring phase, and services to the membership often suffer from understaffing and underperformance during the process. Employee turnover costs are incurred in the hiring, orientation and onboarding phases.

We often conflate orientation with onboarding, but they are materially different.

Orientation vs. Onboarding

Orientation and onboarding are distinct processes. Orientation is a short-term introduction to the club. At the same time, onboarding is an extended process that includes role training, socialization and continuous support to integrate new employees into the organization. Most importantly, it provides culture training, speaking directly about the organization, ethos and

resulting customs beyond rules and bylaws.

The average small business, which includes most private clubs, typically spends one to three days orienting a new employee. This period focuses on helping the new hire acclimate to the company and their role.

Steps in Employee Orientation

According to Talent LMS, the steps in new employee orientation include:

- ◆ Welcome and introduction. The employees' first impression sticks with them, with 62% saying their first impression was accurate after two months.
- ◆ Company overview. Overview of the club's mission, vision, values and culture.
- ◆ Team introductions. BambooHR reports that 87% of employees hope to make new friends at work.
- ◆ Administrative tasks. Paperwork, employment, tax, insurance, etc. forms.
- ◆ Workplace/club tour. Show the new employees around their department's facilities, including restrooms, break rooms, parking, and other important locations.
- ◆ Role-specific training.
- ◆ Job responsibilities. Outline the employee's duties and responsibilities.
- ◆ Tools and equipment. Provide training on tools, software or equipment.
- ◆ Policies and procedures. Review company policies, including attendance, dress code, grooming, code of conduct and safety procedures.
- ◆ Mentor/buddy system. Pair the new employee with a mentor or buddy who can help them navigate their first few weeks and answer any questions.
- ◆ Follow-up. Schedule follow-up meetings with the employee's supervisor to ensure they settle in well and address ongoing needs.

This structured approach helps new employees feel welcomed, informed and prepared to start their new role effectively and, very importantly, as informed as possible about the organization's culture.

Orientation is the beginning of the overarching onboarding process. While orientations may take less than a week with many small businesses, onboarding may be as much as a three-month process and, for larger businesses, up to a year. Orientations must be comforting and light, not overloaded

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Why Orientation and Onboarding are Critical for Boards



DAN DENEHY

Orientation and onboarding are critical for club boards and chairpersons as they are for hiring new staff members. According to a report by BoardSource, only about 40% of nonprofit boards have formal orientation programs, with private clubs potentially having slightly worse statistics.

A structured onboarding process for directors is often lacking, which hinders their understanding of roles and responsibilities. When so, they pick it up along the way. Board orientation

takes on many forms, and rarely is it a part of a more structured onboarding process for directors. This means club boards may not provide new members with the necessary orientation to understand their roles and responsibilities effectively. Chairs of committees may not require as in-depth a process as for new directors. However, chairs should understand their committees' charters and their committee's role in club governance. Typically, the president and/or the retiring chair orient the new chair, and many clubs will have a joint session of all new committee chairs to orient everyone on the big picture of the club's governance.

As Bob pointed out, onboarding should have a formal structure. Still, many aspects are implemented informally depending upon the leader's skills, the directors' competencies, and the time and tools available. Processes such as this require a champion: someone(s) who understands the workings of the board; has the skills, time and commitment to administer the program; and, most importantly, is independent and tenured in the position to implement the process over many years. It is nearly impossible to institutionalize a comprehensive onboarding process if the responsibility falls on the president or other term-bound directors. Their focus should be strategic during their limited time on the board. The general manager has an HR department to administer orientations and onboarding for the staff. Everyone agrees it's a best business practice. Still, we are not at the point where everyone recognizes that a structured orientation and onboarding program is a best governance practice for our board.

Of the clubs that do, the most successful are typically administered by the nominating or governance committees. Among other elements that I will detail later, board surveys and 360 appraisals should also be an integral part of the onboarding process. We do these for the best clubs around the country. These require an outside facilitator or independent committee to administer; otherwise, they'll get wrapped up in politics, and cronyism and anonymity may be questioned.

Components of Board Orientation

Effective board orientation includes providing governance documents, assigning peer mentors, and clear communication plans. A new director

binder with essential information can expedite the process and help new directors integrate more quickly. It should include:

- ◆ The charter of the board.
- ◆ The charters for officers and directors—of course, you have these.
- ◆ Job descriptions for the club's senior leaders.
- ◆ A description of the club governance documents—the bylaws, rules, and board policy manual—and where to find them.
- ◆ A brief description of the three primary fiduciary responsibilities of the board members: duties of care, loyalty and obedience to the bylaws.
- ◆ The code of conduct, confidentiality pledge and conflict of interest statement.
- ◆ General description of officers and directors' liability insurance and indemnification of its directors.
- ◆ The organizational chart and matrix of roles and responsibilities of the board, officers, committees and management.
- ◆ Past board minutes, financial statements, budgets and board and staff contacts.

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Board orientations are often held with the entire board to refresh everyone and begin the socialization of the new directors with the full board. If that is the case, it is helpful for the GM and controller to have a pre-meeting with the new directors to discuss many of the items in the orientation binder in greater detail than may be planned for the entire board orientation. The board orientation may often take more than one two-hour session, and many clubs combine it with an off-site board retreat. **See Dan Denehy on page 60 →**

← *Point/Counterpoint by Bob James continued from page 60*

with too much information but balanced with the need-to-know information and the big picture of the club's mission, vision and values.

Onboarding Phases

1. Orientation.
2. Training and organizational socialization.
3. Ongoing support.

The onboarding process starts with day one of the employee orientation and ends when the employee is fully socialized within the organization, is trained, and is engaged with their role. Much of the onboarding process is socialization:*

- ◆ Introductions beyond the employee's department to include management, club members and governance leadership.
- ◆ Mentorship programs beyond the earlier buddy stage in orientations.

*Organizational socialization is the term for the mechanism through which new employees acquire the necessary knowledge, skills, and behaviors to become effective organizational members, according to Wikipedia.

- ◆ Job-specific training, coaching and cross-training.
- ◆ Employee social events and team-building programs.
- ◆ Goal setting followed by periodic performance feedback, not only at year-end.
- ◆ Continuous communication to address challenges or concerns.

Onboarding should have a formal basis, but many aspects are implemented on an informal basis depending upon the skills of the management team, the complexity of the job, the skills of the employee and the time and tools available. It is essential also to consider that people learn and acclimate at different rates.

Generational Differences in Onboarding

Generational preferences affect how quickly employees want to start their core job functions, with Gen Z employees being the most eager to begin immediately. It is essential to balance ramp-up time to avoid frustration. **CD**

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← *Point/Counterpoint by Dan Denehy continued from page 60*

The orientation itself should include:

- ◆ A facility tour of the back of the clubhouse, maintenance, and other sports and ancillary buildings.
- ◆ Packets containing
 - ▶ Current financial statements and budgets.
 - ▶ Strategic plan.
 - ▶ Long-term capital plan.
 - ▶ Organizational chart.
 - ▶ Role and responsibility matrix.
 - ▶ Orientation agenda.
- ◆ Have the treasurer or club controller review the financial statements and budgets.
- ◆ Have the club's legal chair or attorney review any legal issues and explain the directors' fiduciary responsibilities and codes of conduct.
- ◆ Invite key department heads and their respective committee chairs to discuss issues related to their area of responsibility briefly.
- ◆ Have the general manager discuss the goals and substantive issues facing the club, the club industry and stakeholders.

Onboarding continues for new and existing directors throughout the year, with additional programs and events:

- ◆ Industry experts and consultants should be invited to board meetings to educate the board further.
- ◆ Hosting athletic and social events exclusively for the board and spouses.
- ◆ Distributing industry trade magazines to each director for their education.
- ◆ Invite officers and committee chairs to attend industry workshops for club leadership, such as the National Club Conference, CMAA World Conference and PGA Show.
- ◆ Board Surveys.
- ◆ 360 director performance appraisals.
- ◆ Retreats.

While a board orientation typically takes a half-day, the onboarding process needs to extend well into a new director's first year and, to borrow a metaphor from Will Guidara's top-selling book, "Unreasonable Hospitality," the difference between orientation and onboarding is that orientation is black and white, while onboarding gives color! **CD**

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