

# Board Relations Part I: Getting New Board Members up to Speed With a Strong Orientation Process

An effective board is one whose members understand their role and responsibilities. Even though board members may be very talented and possess great executive skills, they may not necessarily understand the club business, suggests Jerry McCoy, MCM, President of [Clubwise, LLC](#), a consulting firm based in Norcross, GA, specializing in strategic planning, master planning, operational audits and club governance issues. “Many directors don’t understand the product. Private clubs aren’t in the golf or food and beverage business. They’re in the dues and member satisfaction business.” A well-planned and thorough orientation for new club board members helps those individuals understand the club business and to be better board members throughout the year.



Orientation should be held soon after the candidate’s election to the board and before the board’s first meeting. The Nominating Committee should notify the slate of potential candidates on the date of the board retreat or training session. Being available to attend the orientation should be a precondition of running for election to the club board, notes McCoy. Have them block their calendars early. To help new board members understand the inner workings of their club, McCoy recommends that the general manager, as part of the orientation process, take them on a back-of-the-house tour. This is an opportunity to make a candid presentation on the strengths and weaknesses of the operation, give a technology overview, discuss how the equipment in use was selected and why and mention capital improvement needs.

There is a lot of information to cover in a board orientation, says Jerry McCoy, and there are areas that may not get the discussion time they deserve. Those include:

- The board’s responsibilities compared to those of the club committees and the general manager;
- The club mission and vision;
- Membership trends and ongoing strategies to enhance membership;
- The strategic plan;
- A technology overview of the club, including the website;
- The club’s tax status and non-traditional business income limitations; and
- Board resources and ongoing educational opportunities for board members.

Jerry McCoy recommends that the general manager keep board members current on club industry issues and further their training in governance by doing the following:

- Make available to them industry publications, such as [Club Management](#) magazine, The [BoardRoom](#) magazine and [Premier Club Services resources](#).
- Send e-mails referencing informative club industry articles within those publications;
- In the general manager’s report, detail in bullet points the key information from articles that are referenced.
- Be alert to workshops and other instructional opportunities sponsored by CMAA, GCSAA, the PGA of America and other associations, which encourage club leaders to attend.
- Hold strategic planning sessions and other retreats that are run by professional facilitators.

