

# The Paper Trail: The Role of Records/Documentation/Reports in Golf Course Stewardship

*Eighteen years ago, as a student intern, I had a professor who required us to write a detailed report outlining our summer work experience. The report was different from others that I had been required to write. In the past, I had written reports that were narratives or research reports. This time, the assignment was to do a documentary. The report was to document course activities, maintenance procedures, financial records, communications, employee records, etc. The motivation for taking the assignment seriously was simple: The grade that you received on your report counted for 100% of your grade in the professor's class the following semester.*

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As the years passed, I have often thought back to this experience. I remember the work involved in gathering all the information for the report and organizing it into some type of a coherent format. After that came the difficult task of typing the report and compiling all the charts and graphs. Keep in mind that this was 1987. Computers for college kids were the exception, not the norm. Not everyone was proficient in Word, Excel and Publisher. In fact, my report was written on a typewriter (I paid someone to type the report because my typing skills had only evolved as far as the hunt-and-peck technique). Corrections were made using "white-out" correction sheets. The charts and graphs were drawn by hand on quarter-inch graph paper. As I wrote my report, I understood and appreciated the learning experience that my internship had provided. I saw the report as a means to record the experience so that I could relay what I had learned to my teacher. When the report was completed, I remember thinking how glad I was that the assignment was behind me and that I would never have to go through it again. What I didn't realize was that the report was actually a tool that the professor was using to educate the class on the importance of documenting programs, keeping records and writing business reports, all skills that would be necessary down the road.

Fast forward 18 years to 2005. We find that our industry has undergone significant change. Agronomy is still at the core of our profession, but business acumen is running a close second. Records, documentation and reporting are an important aspect of managing a golf course. Technology has made the process much easier, but it has also caused a tremendous increase in the amount of information that we attempt to track. The record-keeping of today far exceeds that which was done 18 years ago. In the end, it appears that my internship report was not a one-time assignment. Instead, it was the first in what has turned into a continuous process of record-keeping, documentation and reporting. At least now I have the benefit of a computer and Microsoft Office.

The following outline lists several types of documents, reports and records that are used as part of a business plan for the golf course. My professor was truly forward-thinking to prepare us for a future that would involve an array of record-keeping and documentation opportunities and demands.

## **1.) Financial Plan**

- Annual budget proposal.
- Statement of goals and objectives that the proposed budget is intended to fund.
- Survey showing local and national averages.

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- Annual budget by line item/month/fiscal quarter.
- Capital budget by item/month.
- Payroll summary by pay period/accrual period.
- Current fertility and pesticide program by application/cost.
- Explanation of major line-item variances from prior year to current year.
- Five-year historical pricing for a “shopping cart” of commonly used golf course items.
- Budget reprisal plan (if needed).
- Monthly inventory of plant protectants.
- Monthly payroll accrual report.
- Annual itemized report of equipment-repair costs.
- Maintenance department ledger of accounts with expenses coded to line items.
- Monthly reconciliation of maintenance-department ledger with ledger from the accounting office.
- Variance of projected versus actual labor costs tracked by pay period/year to date.
- Equipment inventory with current and replacement value.
- Five-year capital equipment-replacement projection.

## 2.) Communication Plan

- Flow chart to facilitate effective communication.
- Weekly e-mail update to green committee and board of directors.
- Monthly newsletter article.
- Monthly update of bulletin-board material.
- Direct accessibility to answer questions in person.
- Attendance at monthly board of directors meeting.
- Attendance at annual budget finance meeting.
- Preparation of year-end annual report for presentation at the annual membership meeting.
- New-member orientation packet.
- “Glad You Asked!” informational postings.
- “Did You Know?” informational postings.
- Web site postings and mass e-mail pushes.
- Suggestion box, surveys.
- PowerPoint presentations.
- Posters, signage.
- Phone system—informational messages.

- Daily informational meeting with the crew.

## 3.) Green Committee and Board of Directors

- Monthly green committee agenda.
- Monthly green committee minutes with list of assigned follow-up action items.
- Monthly board of directors report.
- “Issue/Resolution” proposals to document course of action used to resolve maintenance issues or problems.
- Written standard operating procedures for the maintenance department.
- Written goals and action plans for short- and long-term improvement of the facility.

## 4.) Human Resources

- Manpower study of hourly labor usage by task/week/season.
- Template for daily work schedule.
- Template for weekly work schedule.
- Template for annual/seasonal maintenance activities.
- Mission statement/organizational chart.
- Employee manual.
- Job descriptions.
- Employee recruitment program.
- Employee orientation/training program.

- Employee retention/morale program.
- Employee discipline/termination procedures.
- Management succession plan for key staff positions.
- Employee files.
- Log of daily activities and job assignments.

## 5.) Other Types of Documents, Records and Reports

- Historical fertility and pesticide records.
- Daily weather records.
- Daily irrigation records—water usage/pump maintenance/repair records.
- Tree inventory/maintenance.
- Soil-test records.
- Maintenance of computer files.
- Maintenance of historical course record related to long-range planning and course improvements.
- Maintenance of course photo library—digital and film.
- Maintenance of blueprints and as-built archive.
- Maintenance of equipment-repair records.



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*Reinders* Bruce Schweiger  
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