A Guide to an Acceptable Level 1 Portfolio

Getting off to a good start is imperative for success in PGA PGM 2.0 Program, and career

By David Kraus, PGA

The purpose of this article is to highlight the importance of the Work Experience Portfolio, how it relates to the potential success of apprentices, and to identify critical areas during the review process.

The Work Experience Portfolio is a key element in the PGA PGM 2.0 Program. It allows apprentices and PGA Golf Management students to demonstrate their knowledge and understanding of the course concepts, and how they can be utilized and implemented via case studies and in the workplace. How well this is communicated in the Work Experience Portfolio allows the reviewer to determine if the apprentice has a good understanding of the content presented in the course manuals and seminars, and how prepared they might be for each level of testing.

It is important to note that the case studies (Saguaro Sands, a public facility, and Pine Valley, a private facility) play an integral role in not only the courses themselves, but in the work experience activities within the portfolio. The apprentice will decide which case study facility they want to use for the eight Case Study Activities, and will complete these activities according to the instructions. These activities are interrelated, and the reviewer is looking for the connection that each has within the portfolio.

Building Your Plan

Case Study Activity 1 **defines the business** of the facility. It's important for the apprentice to be detailed and thorough in his or her answers. Are the core values of the facility an honest description of what actually exists at the case study facility? Has the apprentice described the market, customer demographics and the competition (direct and indirect) correctly? Is the *Executive Summary* a detailed overview of the business plan (written after completing the first five Case Study Activities), or just a restatement of the facility profile?

Assessing the Current State of the Business is Case Study Activity 2, and contains a SWOT analysis of the case study facility. In this activity the reviewer is looking for detail in the descriptions of the *strengths, weaknesses, opportunities* and *threats,* and whether the apprentice understands the difference between an *internal factor* (under the facility's control) or *external factor* (outside of the facility's control). In this SWOT analysis, it is important to remember that this is for the "current" state of the business rather than potential of the business.

The third Case Study Activity asks the apprentice to identify four specific **business objectives** and describe two related **strategies** for each that will allow the facility to accomplish them. These objectives should have a financial significance for the facility, and will be indicated in the **financial forecast** that will be created in Case Study Activity 4. These objectives need to be S.M.A.R.T. – specific, meaningful (and measurable), achievable, realistic and time-oriented.

Case Study Activity 4 includes the **financial forecast** and the **operating budget**. If the apprentice has written good objectives in Case Study Activity 3, they can be applied to the forecast. The dollars and cents in the forecast should make sense and the revenues and expenses should be in alignment. The linear trend analysis of the last five years of these line items provides a good starting point for determining the forecasted numbers. When the revised forecast is complete, the annual numbers are transferred to the operating budget and distributed over the 12-month period following the seasonality of the facility's geographical locale.

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Key to the overall business plan is Case Study Activity 5 – **monitoring the plan**. The business plan is a living document, and key performance metrics must be identified and monitored periodically throughout the year. When variances occur, the plan may need to be changed. The reviewer looks for specific actions that may be taken by the facility if discrepancies are discovered between the plan and what is actually happening at the facility. Be sure to identify the range of acceptability for these variances and the corrective actions that would need to be in place to address the unacceptable variances.

For Case Study Activity 6, the apprentice will describe the **business value of effective customer relations** for their case study facility. Using the mission statement and customer demographics from the business plan they created in Case Study Activities 1-5, as well as the *customer service model* described in the *Customer Relations* course manual and seminar, the apprentice must describe how the staff at the case study facility will be trained to provide the level of service that is expected by the customer. Be sure to connect any staffing additions to the financial forecast in the "labor expense line item" and any other line items connected to staffing and training.

Be in Sync with Business Plan

Tournament operations at most facilities is a core business area of the golf operation and planning is fundamental to its success. Case Study Activity 7 asks the apprentice to create a tournament operations business plan for the case study facility they chose for the overall business plan. The plan must be **in alignment with the facility's overall business plan**. It cannot contradict it. If there is a tournament specific objective in the overall plan, then that objective should be used in this activity, and vice versa.

Case Study Activity 8 requires the apprentice to create a business plan for the golf car fleet at the facility – one that must also be in sync with the overall business plan. Both courses have older fleets, and if the apprentice indicates that a new fleet is going to be leased or purchased, then this action should appear in both business plans. Something this significant should also appear on the financial worksheet and operating budget.

Customer Relations' Activities 1-3 are based on the apprentice's own facility. In Activity 1, various *moments of truth* are described. They must be identified as either **interactive** or **non-interactive** and the apprentice should indicate which of the three keys elements from the *customer relations model* (resources, staffing and/or systems) is involved.

Activity 2 asks the apprentice to describe four different challenging customer interactions and determine which of the **interaction strategies** is employed based on the **desired outcome** that was sought. The apprentice must also indicate which of the **interpersonal skills** was initially used as well as any additional skill(s). Remember to use correct terminology, as it will assist the reviewer in understanding the apprentice's overall knowledge of a customer interaction. Figure 8 in Lesson 2 of the *Customer Relations* course manual is a helpful resource for these concepts. Finally, for Activity 3, the apprentice describes any customer service training that they receive at their facility.

For Tournament Operations' Activities 1-3, the apprentice is tasked with helping to **plan, run and evaluate a specific tournament** at his or her own facility. The key to these activities is the additional documentation that must be attached. The reviewer is looking for a

tournament budget or profit and loss statement, promotional materials, rules sheets, photographs of cart staging and scoreboard, tournament results, etc. The tournament being described also needs to be significant enough to generate these supplementary materials.

Golf Car Fleet Activities 1-4 pertain to the home facility of the apprentice, and include a thorough review of the policies and procedures covering staff training, rental procedures, car rotation, safety and accidents, breakdowns and record keeping. Maintenance procedures, an evaluation of the storage facilities, and financial expectations are also included.

Final Thoughts

The last set of activities in the portfolio concerns instruction. The five activities detail a three-lesson series with a **beginning student**. The apprentice should be able to describe how the student was evaluated using the five ball flight laws and cause and effect to determine how to instruct the student. The videos submitted of the three lessons should show the progression of learning undertaken by the student over the course of the three lessons.

It is important to complete all work experience activities with detailed and thoughtful explanations. These activities reflect an apprentice's or student's level of effort and subsequent learning. The portfolio can also be presented to potential employers as a record of an applicant's skills and experience. Please contact the PGA PGM Mentor line at 866-866-3382 ext. 6 or pgapgmmentor@pgahq.com for any questions, additional information or clarification. ■

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