MINISTRY OF CULTURE, SPORTS AND TOURISM
**VIETNAM NATIONAL ADMINISTRATION OF TOURISM**



**VIETNAM TOURISM OCCUPATIONAL STANDARDS**

# FOOD & BEVERAGE
# SERVICE

**VTOS**

Tiêu chuẩn nghề Du lịch Việt Nam
Vietnam Tourism Occupational Standards

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**Hanoi, 2015**

## ACKNOWLEDGEMENTS:

## GLOSSARY

| ITEM | DEFINITION |
|---|---|
| Assessment | The process of making judgements about the extent to which a candidate's work meets the assessment criteria for a qualification or unit, or part of a unit |
| Assessment criteria | Assessment criteria list the performance/skills and knowledge and understanding that need to be assessed |
| Assessment methods | VTOS allows a variety of assessment methods that are appropriate for different types of performance or knowledge |
| Assessor | An experienced person who is qualified to assess the performance of the candidate and usually from the same area of work, e.g. Front Office Supervisor |
| Assessor guide | A guide for assessors on how to assess the candidate and how to record and document the candidate performance and knowledge |
| Attitudes/behaviours | Attitudes and behaviours impact on the quality of work performance and so these are important aspects of 'being competent.' Attitudes and behaviours describe the general ways in which individuals go about achieving the outcomes |
| Certification | The award of a certificate or diploma to a candidate based on assessment of performance |
| Competency | Competency is the ability to apply specific skills, knowledge and behaviours/attitudes necessary to fulfil the job requirements satisfactorily |
| Core units | Core units include basic competencies that all employees must possess (e.g. communication skills) |
| Functional units | Functional (technical/professional) units relate to the hospitality or tourism job itself |
| Generic units | Generic competencies are those competencies that are common to a group of jobs such as cookery or travel |
| Management units | These are the generic competencies for roles in an organization that involve managing, supervising or influencing the work of others in some way. |
| Standards | Occupational standards define the knowledge, skills and attitudes/behaviours (competence) required for effective workplace performance |
| Unit of competence | A unit is the smallest part of a qualification can be certified individually |
| VTOS | Vietnam Tourism Occupational Standards |

# CONTENTS

# I. INTRODUCTION

With the aim to help meet the needs for a qualified workforce for the tourism industry in Vietnam, the EU-funded, Environmentally & Socially Responsible Tourism Capacity Development Programme (ESRT) was tasked to revise the Vietnam Tourism Occupational Skills Standards (VTOS) which were originally developed under the EU-funded Human Resource Development in Tourism Project (HRDT). The revised VTOS have been developed and benchmarked against international occupational standards and ASEAN Common Competency Standards for Tourism Professionals (ACCSTP) and will satisfy the requirements of the ASEAN Mutual Recognition Arrangement for Tourism Professionals (MRA-TP).

**Occupational Standards** refer to the agreed minimum best practice for jobs in the tourism/hospitality industry, and include the statutory (legal, health, safety, security) requirements. They specify what a person should know and do, as well as the way they do their work, in order to carry out the functions of a particular job in the context of the work environment.

VTOS covers two major divisions within the tourism sector (hospitality and travel) with six key occupational areas in line with ASEAN: **Hospitality Division** (Front Office Operations, Housekeeping Operations, Food & Beverage Service, Food Preparation) and **Travel Division** (Travel & Tour Operations, Tour Guiding). VTOS also includes four specialist areas (Hotel Management, Small Accommodation Operations, On-site Tour Guiding, and Tourist Boat Service) to meet the unique requirements of Vietnam tourism industry.

VTOS units of competence have been grouped to provide a range of **industry-relevant qualifications/job titles** from basic to advanced levels and also a number of diplomas suitable for college teaching, therefore making it relevant for the industry and the formal education sector.

VTOS can be used by:

**Hospitality and travel companies** to set a standard for how the work of their employees should be completed. VTOS units can be used for training staff in the key skills and job functions for a range of skills. In addition VTOS can be used to assess the performance of staff against the standards. Organizations can arrange to register their staff with an assessment centre to formally recognise or assess their skills and gain a certificate.

**Colleges and training organisations** to design their hospitality or tourism curriculum. VTOS clearly specifies the skills, knowledge and behaviours required for particular jobs in the industry. VTOS units can be compiled to provide a curriculum for a range of education and training courses or programmes.

## VTOS DEVELOPMENT METHODOLOGY

VTOS was prepared by conducting a detailed functional analysis of hospitality and tourism jobs with a technical working group of industry experts to identify the key competencies needed for jobs for the tourism sector. The functional analysis provides an accurate and detailed separation of the functions which have to be carried out in order to achieve the key purpose of the sector, occupation or area of work.

A review of Vietnam tourism qualifications and occupational standards has been conducted via a national Training Needs Assessment (TNA). The outcome of the TNA identified areas of skills shortages and defined skills requirements and competencies that will be required of tourism professionals.

Six occupational areas identified by ASEAN and the previous Vietnam Tourism Occupational Skills Standards were then used as a baseline to verify the findings of the functional analysis, and the competencies identified by the Technical Working Groups were then benchmarked against international standards to ensure any gaps were filled.

The VTOS were then developed using an international occupational standards approach which developed the contents of the standards as competencies in a format compatible with ASEAN. The units of competence include a unit title, the performance criteria, knowledge requirements, conditions of performance and variables, assessment criteria, assessment

methods and references to ACCSTP. These competencies were then grouped into levels according to the ASEAN definition.

VTOS units of competence were prepared by a team of international and Vietnamese subject experts. The units were reviewed by Technical Working Groups comprising industry practitioners and vocational trainers from local institutions. Feedback from these consultations have been incorporated, revised into the standards, and a selection of units have been piloted with trainees to ensure the level and content was appropriate for the job areas identified.

## VTOS LEVELS AND QUALIFICATIONS

| VTOS consists of five qualification levels in six key occupational areas | |
|---|---|
| **Level 5 (Advanced Diploma 5)** | Sophisticated, broad and specialised competence with senior management skills; Technical, creative, conceptual or managerial applications built around competencies of either a broad or specialised base and related to a broader organisational focus. |
| **Level 4 (Diploma 4)** | Specialised competence with managerial skills; Assumes a greater theoretical base and consists of specialised, technical or managerial competencies used to plan, carry out and evaluate work of self and/or team. |
| **Level 3 (Certificate 3)** | Greater technical competence with supervisory skills; More sophisticated technical applications involving competencies requiring increased theoretical knowledge, applied in a non-routine environment and which may involve team leadership and increased responsibility for outcomes. |
| **Level 2 (Certificate 2)** | Broad range of skills in more varied context with more responsibilities; Skilled operator who applies a broad range of competencies within a more varied work context and capable for working in groups, working independently in some cases and taking a significant responsibility for their own work results and products. |
| **Level 1 (Certificate 1)** | Basic, routine skills in a defined context; A base operational qualification that encompasses a range of functions/activities requiring fundamental operational knowledge and limited practical skills in a defined context. |

# VTOS COMPETENCY UNITS

VTOS is structured in units of competence using a modular format so that it is flexible and easily adapted for different jobs, personnel and qualifications. It is suitable for use in small to medium enterprises, large hotels, tour operator and travel companies, as well as for use in colleges and educational institutions. It can be used as the basis for curriculum in colleges. In addition, VTOS includes units on Responsible Tourism suitable for a range of jobs from all occupations. In this way, VTOS has been developed with the flexibility required for a fast-growing tourism industry as well as the breadth required for a range of technical and highly professional jobs at a number of levels from entry level up to Senior Management level.

VTOS consists of a range of units of competence that specify particular skills, knowledge and behaviours/attitudes necessary to fulfil the job requirements satisfactorily. Each job will consist of a blend of functional, core and generic units.

- **Functional (technical/professional)** competencies are specific to roles or jobs within the tourism industry, and include the specific skills and knowledge (know-how) to perform effectively (e.g. food service, tour guiding etc.).

- **Core (common) competencies** include the basic skills that most employees should possess (e.g., working with others, language and IT skills). These competencies are essential for anyone to do their job competently.

- **Generic (job related) competencies** are those competencies that are common to a group of jobs. They often include general job competencies that are required in a number of occupations (e.g., health & safety), as well as job specific competencies that apply to certain occupations more than others (e.g., close the shift).

- **Management competencies** are the generic competencies for roles in an organization that involve managing, supervising or influencing the work of others in some way. They may be specific to a job role (supervise housekeeping operations) or general to any supervisory/management role (arrange purchase of goods and services etc.).

- **Responsible tourism competencies** are the specific skills required for the operation and management in the organisation for the enhancement of the quality of services and products towards a sustainable tourism development, operations and products of responsible tourism.

| Abbreviations for group of units | | | |
|---|---|---|---|
| COS | Core Standards | FBS | Food & Beverage Service Standards |
| GES | Generic Standards | FOS | Front Office Operations Standards |
| RTS | Responsible Tourism Standards | FPS | Food Preparation Standards |
| CMS | Customer Service & Marketing Management Standards | HKS | Housekeeping Operations Standards |
| FMS | Financial Management Standards | TBS | Tourist Boat Service Standards |
| GAS | General Administration Management Standards | TGS | Tour Guiding Standards |
| HRS | Human Resource Management Standards | TOS | Travel & Tour Operation Standards |
| SCS | Security Management Standards | | |

# UNIT STRUCTURE

The VTOS units of competence comprise the following:

| Unit Section | Description | Example |
|---|---|---|
| **Unit Number** | • Number of the unit e.g. FOS1.3 is Front Office Operations Standard, Level 1, Unit 3 | FOS1.3 |
| **Unit Title** | • Title of the Unit | PROVIDE GUEST SERVICES |
| **Unit Descriptor** | • Summary or overview of the unit | This unit describes the competencies required by front office staff to interface of with guests in a number of varied situations, responding to their requirements and expectations with cultural and professional sensitivity to satisfy needs and resolve problems. |
| **Elements** | • Units are divided into two or more elements that describe the activities the person has to carry out.<br>• Elements can provide structure to a complex function and break up long lists of Performance Criteria by presenting them in logical sections | E1. Handle questions and requests<br>E2. Process safety deposit boxes<br>E3. Exchange foreign currency<br>E4. Handle guest disbursements |
| **Performance Criteria** | • Performance Criteria should be observable and measurable so they can be accurately assessed.<br>• Performance (skills) will normally be assessed by observation (levels 1-3) or by documentary evidence of performance from the workplace, especially at management level (levels 4-5). | *E1. Handle questions and requests*<br>P1. Answer guest questions and enquiries promptly and courteously and take personal responsibility for finding the answers<br>P2. Assist guests in making bookings for restaurants, conferences or banquets etc<br>P3. Compile a dossier of information commonly requested or likely to be asked for<br>P4. Prepare local contact numbers and contact details for guest use<br>P5. ..... |
| **Knowledge Requirements** | • Units of competence include essential underpinning knowledge that enables the work to be done with understanding.<br>• Knowledge includes understanding of facts, principles and methods which ensure that the person who measures up to the standard can be effective in other organisations, related job roles and work contexts and be better placed to deal with the unusual or unexpected.<br>• Each knowledge item will normally be assessed by oral or written questioning. | K1. Explain the benefits and alternatives for airline travel and associated travel means such as trains, buses and taxis<br>K2. Explain the procedure for travel reservations, confirmations and how to enquire about regarding flight status<br>K3. Describe the procedures for issuing, allowing access to and closing a safety deposit box<br>K4. Describe the steps in exchanging currency for a guest |

| Unit Section | Description | Example |
|---|---|---|
| **Conditions of performance and variables** | • Conditions of performance and variables takes account of the fact that the real world contains many variables, and the units should cover these (e.g. in a hotel, a receptionist may encounter many different types of customer and different hotels may provide different facilities).<br>• Rather than include these differences in the performance criteria, the range of variables will identify different types of activities and conditions under which the performance could take place. | *4. Cash disbursements may include:*<br>• Paid-out as a reverse cash transaction in the cash account folio debiting the guest account<br>• A cash receipt docket signed by the guest and retained in the folio bin<br>• In certain establishment supervisory authorisation may be required for such transactions with limits applying |
| **Assessment Guide** | This section specifies the **amount and type of evidence needed** to show that the trainee/learner has met the standards specified in the performance criteria and in all the circumstances defined in the evidence of achievement.<br>• Evidence of the candidate's performance, knowledge, understanding and skills needs to be recorded and examined for quality control purposes.<br>• This is often presented in a folder known as a portfolio of evidence or in a passbook.<br>• Assessment needs to be cost effective and time efficient to be sustainable.<br>• All assessment needs to be internally verified by an assessment centre to ensure it is valid, current, rigorous and objective. | *Evidence of the following is required:*<br>1. At least three different requests or issues handled accurately and satisfactorily<br>2. At least two safety deposit boxes issued according to procedures<br>3. At least three foreign currency transactions handled accurately according to procedures<br>4. At least two guest disbursements made according to procedures<br><br>*Assessment must ensure:*<br>• Access to an actual workplace or simulated environment<br>• Access to office equipment and resources<br>• Documentation of guest transactions as evidence of performance |
| **Assessment Methods** | The main assessment methods for VTOS include:<br>• Assessors observing trainees at work (or, in some cases, under realistic simulated conditions)<br>• Trainees supplying examples of records and documents that show they work to the standard<br>• Line managers and supervisors providing statements about the trainee's work<br>• Candidate answering questions from their assessors or completing written tests | This unit may be assessed on or off the job<br>• Assessment can include evidence and documentation from the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge<br>• Assessment must relate to the individual's work area or area of responsibility<br><br>The following methods may be used to assess:<br>• Case studies<br>• Observation of practical candidate performance<br>• Oral and written questions<br>• Documentation from the workplace<br>• Problem solving<br>• Role plays<br>• Third party reports completed by a supervisor<br>• Project and assignment work |
| **Relevant Occupations** | • The relevant job roles/job titles for which the unit is appropriate | Front Desk Officer, FO Clerk, Guest Service Agent, Receptionist, Front Office Supervisor |
| **ACCSTP References** | • Cross-reference to the relevant standard from (ASEAN Common Competency Standards for Tourism Professionals), if available | DH1.HFO.CL2.03 1.8, 3.6, 4.2 |

## II. FOOD & BEVERAGE SERVICE OCCUPATIONS

The Vietnam Tourism Occupational Standards (VTOS) for Food & Beverage Service cover all F&B jobs at five levels from waiter (Level 1) to Restaurant Manager (Level 4) and F&B Director (Level 5). The VTOS F&B Service standards have also taken account of local hotel operations.

**Typical jobs include:** Food & Beverage Manager, Food & Beverage Supervisor, Restaurant Manager, Assistant Restaurant Manager, Chef de Rang/Team Leader, Head Waiter/Sommelier, Waiter/Waitress, Bar Waiter/Waitress, Bartender, Assistant Bartender

**Food & Beverage Manager** ensures service delivery at every point of sale in the Food and Beverage Department.

**Food & Beverage Supervisor** assists with the responsibility for the day to day running of the department and ensures quality of service in the restaurant as well as manages the day to day operations and staff management.

**Restaurant Manager** is responsible for the image of the restaurant and increasing its sales (from preparation to service).

**Assistant Restaurant Manager** assists the Restaurant Manager as well as hosting and communicating with guests, staff management: recruitment, training, evaluation and promotion.

**Team Leader** will supervise the quality of the services offered to customers, train and motivate the dining room assistants and look after customer billing and tills.

**Head Waiter** will welcome and seat diners, advising each on their choice of food and wine and taking their order, organise the layout of the restaurant to create a warm and welcoming atmosphere and co-ordinate with the kitchen.

**Waiter/Waitress** will arrange the dining room, welcome and serve restaurant guests and tidy the restaurant after meal service.

**Bartender** – will look after the bar and drink service.

## LIST OF UNITS OF COMPETENCE

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.1 | PREPARE THE RESTAURANT FOR FOOD SERVICE | ✓ | | | | | | |
| 2 | FBS1.2 | TAKE RESERVATIONS | ✓ | | | | | | |
| 3 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 4 | FBS1.4 | TAKE AND PLACE AN ORDER | ✓ | | | | | | |
| 5 | FBS1.5 | SERVE FOOD AT TABLE | ✓ | | | | | | |
| 6 | FBS1.6 | SERVE DRINKS AND ACCOMPANIMENTS | ✓ | | | | | | |
| 7 | FBS1.7 | CLEAR TABLE | ✓ | | | | | | |
| 8 | FBS1.8 | PROVIDE ROOM SERVICE | ✓ | | | | | | |
| 9 | FBS1.9 | PROVIDE BANQUET AND CONFERENCE SERVICE | ✓ | | | | | | |
| 10 | FBS2.1 | OPERATE A BAR | | ✓ | | | | | |
| 11 | FBS2.2 | SERVE WINE | | ✓ | | | | | |
| 12 | FBS2.3 | PREPARE & SERVE COCKTAILS | | ✓ | | | | | |
| 13 | FBS2.4 | PREPARE TO SERVE ESPRESSO COFFEE | | ✓ | | | | | |
| 14 | FBS2.5 | MAKE ESPRESSO COFFEE | | ✓ | | | | | |
| 15 | FBS2.6 | SERVE AND PRESENT ESPRESSO COFFEE | | ✓ | | | | | |
| 16 | FBS3.1 | MONITOR FOOD & BEVERAGE SERVICE | | | ✓ | | | | |
| 17 | FBS3.2 | PROVIDE SPECIALIST ADVICE ON WINE | | | ✓ | | | | |
| 18 | FBS3.3 | PLAN AND MONITOR QUALITY OF ESPRESSO COFFEE | | | ✓ | | | | |
| 19 | HRS3 | CONDUCT A STAFF PERFORMANCE REVIEW | | | ✓ | | | | |
| 20 | HRS7 | PROVIDE ON-THE-JOB COACHING | | | ✓ | | | | |
| 21 | HRS8 | DELIVER A GROUP TRAINING SESSION | | | ✓ | | | | |
| 22 | HRS9 | QUALITY ASSURE WORK IN YOUR TEAM | | | ✓ | | | | |
| 23 | HRS10 | PLAN, ALLOCATE AND MONITOR WORK OF A TEAM | | | ✓ | | | | |
| 24 | FMS4 | PREPARE & ANALYSE FINANCIAL STATEMENTS & REPORTS | | | ✓ | | | | |
| 25 | GAS5 | PLAN, MANAGE AND CONDUCT MEETINGS | | | ✓ | | | | |
| 26 | SCS3 | OPERATE BASIC SECURITY EQUIPMENT | | | ✓ | | | | |
| 27 | FBS4.1 | MANAGE FOOD & BEVERAGE OPERATIONS | | | | ✓ | | | |
| 28 | HRS1 | IDENTIFY STAFF DEVELOPMENT NEEDS | | | | ✓ | | | |
| 29 | HRS4 | INITIATE AND FOLLOW DISCIPLINARY PROCEDURES | | | | ✓ | | | |
| 30 | HRS5 | RECRUIT, SELECT AND RETAIN STAFF | | | | ✓ | | | |
| 31 | HRS6 | HANDLE STAFF GRIEVANCES AND RESOLVE PROBLEMS | | | | ✓ | | | |
| 32 | HRS11 | IMPLEMENT OCCUPATIONAL HEALTH AND SAFETY PRACTICES | | | | ✓ | | | |
| 33 | FMS1 | PREPARE BUDGETS | | | | ✓ | | | |
| 34 | FMS3 | MANAGE BUDGETS | | | | ✓ | | | |
| 35 | CMS1 | MANAGE QUALITY SERVICE & CUSTOMER SATISFACTION | | | | ✓ | | | |
| 36 | CMS3 | ORGANIZE FUNCTIONS | | | | ✓ | | | |
| 37 | GAS6 | MANAGE DAILY OPERATIONS | | | | ✓ | | | |

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 38 | RTS4.7 | APPLY RESPONSIBLE TOURISM TO FOOD & BEVERAGE OPERATIONS | | | | ✓ | | | |
| 39 | HRS2 | PLAN THE WORKFORCE | | | | | ✓ | | |
| 40 | GAS3 | ESTABLISH POLICIES AND PROCEDURES | | | | | ✓ | | |
| 41 | COS1 | USE THE TELEPHONE IN THE WORKPLACE | | | | | | ✓ | |
| 42 | COS2 | WORK EFFECTIVELY WITH OTHERS | | | | | | ✓ | |
| 43 | COS3 | COMPLETE ROUTINE ADMINISTRATIVE TASKS | | | | | | ✓ | |
| 44 | COS4 | USE ENGLISH AT A BASIC OPERATIONAL LEVEL | | | | | | ✓ | |
| 45 | COS5 | MAINTAIN INDUSTRY KNOWLEDGE | | | | | | ✓ | |
| 46 | COS6 | PROVIDE BASIC FIRST AID | | | | | | ✓ | |
| 47 | COS7 | PROVIDE SAFETY AND SECURITY | | | | | | ✓ | |
| 48 | COS8 | RESPOND TO EMERGENCIES | | | | | | ✓ | |
| 49 | COS10 | USE COMMON BUSINESS TOOLS AND TECHNOLOGY | | | | | | ✓ | |
| 50 | GES1 | PREPARE FOR WORK | | | | | | | ✓ |
| 51 | GES2 | RECEIVE AND RESOLVE COMPLAINTS | | | | | | | ✓ |
| 52 | GES3 | CLOSE DOWN THE SHIFT | | | | | | | ✓ |
| 53 | GES4 | PROCESS FINANCIAL TRANSACTIONS | | | | | | | ✓ |
| 54 | GES5 | ORDER AND RECEIVE NEW STOCKS | | | | | | | ✓ |
| 55 | GES6 | PROMOTE & SELL PRODUCTS & SERVICES | | | | | | | ✓ |
| 56 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 57 | GES9 | DEVELOP GUEST RELATIONSHIPS | | | | | | | ✓ |
| 58 | GES10 | PREPARE AND PRESENT REPORTS | | | | | | | ✓ |
| 59 | GES14 | PREVENT, CONTROL AND FIGHT FIRES | | | | | | | ✓ |
| 60 | GES15 | DEAL WITH INTOXICATED AND UNAUTHORIZED PERSONS | | | | | | | ✓ |
| 61 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

## FOOD & BEVERAGE SERVICE QUALIFICATIONS

| Cert No | Occupational Qualifications (aimed at industry) | Level |
|---------|------------------------------------------------|-------|
| CFB1 | Certificate in Food & Beverage Service | 1 |
| CFB2 | Certificate in Food & Beverage Service | 2 |
| CBT2 | Certificate in Bartending | 2 |
| CBO2 | Certificate in Barista Operations | 2 |
| CBO3 | Certificate in Barista Operations | 3 |
| CFBS3 | Certificate in Food & Beverage Supervision | 3 |
| CWS3 | Certificate in Wine Service | 3 |
| DFSO4 | Diploma in Food Service Operations | 4 |

## CFB1 - Certificate in Food & Beverage Service Level 1 (16 Units)

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|---|---|---|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.1 | PREPARE THE RESTAURANT FOR FOOD SERVICE | ✓ | | | | | | |
| 2 | FBS1.2 | TAKE RESERVATIONS | ✓ | | | | | | |
| 3 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 4 | FBS1.4 | TAKE AND PLACE AN ORDER | ✓ | | | | | | |
| 5 | FBS1.5 | SERVE FOOD AT TABLE | ✓ | | | | | | |
| 6 | FBS1.6 | SERVE DRINKS AND ACCOMPANIMENTS | ✓ | | | | | | |
| 7 | FBS1.7 | CLEAR TABLE | ✓ | | | | | | |
| 8 | FBS1.8 | PROVIDE ROOM SERVICE | ✓ | | | | | | |
| 9 | FBS1.9 | PROVIDE BANQUET AND CONFERENCE SERVICE | ✓ | | | | | | |
| 10 | COS1 | USE THE TELEPHONE IN THE WORKPLACE | | | | | | ✓ | |
| 11 | COS2 | WORK EFFECTIVELY WITH OTHERS | | | | | | ✓ | |
| 12 | COS4 | USE ENGLISH AT A BASIC OPERATIONAL LEVEL | | | | | | ✓ | |
| 13 | COS5 | MAINTAIN INDUSTRY KNOWLEDGE | | | | | | ✓ | |
| 14 | GES1 | PREPARE FOR WORK | | | | | | | ✓ |
| 15 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 16 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

## CFB2 - Certificate in Food & Beverage Service Level 2 (25 Units)

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|---|---|---|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.1 | PREPARE THE RESTAURANT FOR FOOD SERVICE | ✓ | | | | | | |
| 2 | FBS1.2 | TAKE RESERVATIONS | ✓ | | | | | | |
| 3 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 4 | FBS1.4 | TAKE AND PLACE AN ORDER | ✓ | | | | | | |
| 5 | FBS1.5 | SERVE FOOD AT TABLE | ✓ | | | | | | |
| 6 | FBS1.6 | SERVE DRINKS AND ACCOMPANIMENTS | ✓ | | | | | | |
| 7 | FBS1.7 | CLEAR TABLE | ✓ | | | | | | |
| 8 | FBS1.8 | PROVIDE ROOM SERVICE | ✓ | | | | | | |
| 9 | FBS1.9 | PROVIDE BANQUET AND CONFERENCE SERVICE | ✓ | | | | | | |
| 10 | FBS2.1 | OPERATE A BAR | | ✓ | | | | | |
| 11 | FBS2.2 | SERVE WINE | | ✓ | | | | | |
| 12 | FBS2.4 | PREPARE TO SERVE ESPRESSO COFFEE | | ✓ | | | | | |
| 13 | COS1 | USE THE TELEPHONE IN THE WORKPLACE | | | | | | ✓ | |
| 14 | COS2 | WORK EFFECTIVELY WITH OTHERS | | | | | | ✓ | |
| 15 | COS3 | COMPLETE ROUTINE ADMINISTRATIVE TASKS | | | | | | ✓ | |
| 16 | COS4 | USE ENGLISH AT A BASIC OPERATIONAL LEVEL | | | | | | ✓ | |
| 17 | COS5 | MAINTAIN INDUSTRY KNOWLEDGE | | | | | | ✓ | |
| 18 | GES1 | PREPARE FOR WORK | | | | | | | ✓ |
| 19 | GES2 | RECEIVE AND RESOLVE COMPLAINTS | | | | | | | ✓ |
| 20 | GES5 | ORDER AND RECEIVE NEW STOCKS | | | | | | | ✓ |
| 21 | GES6 | PROMOTE & SELL PRODUCTS & SERVICES | | | | | | | ✓ |
| 22 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 23 | GES9 | DEVELOP GUEST RELATIONSHIPS | | | | | | | ✓ |
| 24 | GES15 | DEAL WITH INTOXICATED AND UNAUTHORIZED PERSONS | | | | | | | ✓ |
| 25 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

## CBT2 - Certificate in Bartending Level 2 (19 Units)

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|-----|---------|------------|---|---|---|---|---|------|---------|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 2 | FBS1.6 | SERVE DRINKS AND ACCOMPANIMENTS | ✓ | | | | | | |
| 3 | FBS2.1 | OPERATE A BAR | | ✓ | | | | | |
| 4 | FBS2.2 | SERVE WINE | | ✓ | | | | | |
| 5 | FBS2.3 | PREPARE & SERVE COCKTAILS | | ✓ | | | | | |
| 6 | FBS2.4 | PREPARE TO SERVE ESPRESSO COFFEE | | ✓ | | | | | |
| 7 | COS1 | USE THE TELEPHONE IN THE WORKPLACE | | | | | | ✓ | |
| 8 | COS2 | WORK EFFECTIVELY WITH OTHERS | | | | | | ✓ | |
| 9 | COS4 | USE ENGLISH AT A BASIC OPERATIONAL LEVEL | | | | | | ✓ | |
| 10 | COS5 | MAINTAIN INDUSTRY KNOWLEDGE | | | | | | ✓ | |
| 11 | COS7 | PROVIDE SAFETY AND SECURITY | | | | | | ✓ | |
| 12 | GES1 | PREPARE FOR WORK | | | | | | | ✓ |
| 13 | GES2 | RECEIVE AND RESOLVE COMPLAINTS | | | | | | | ✓ |
| 14 | GES3 | CLOSE DOWN THE SHIFT | | | | | | | ✓ |
| 15 | GES5 | ORDER AND RECEIVE NEW STOCKS | | | | | | | ✓ |
| 16 | GES6 | PROMOTE & SELL PRODUCTS & SERVICES | | | | | | | ✓ |
| 17 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 18 | GES15 | DEAL WITH INTOXICATED AND UNAUTHORIZED PERSONS | | | | | | | ✓ |
| 19 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

## CBO2 - Certificate in Barista Operations Level 2 (12 Units)

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|---|---|---|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 2 | FBS1.6 | SERVE DRINKS AND ACCOMPANIMENTS | ✓ | | | | | | |
| 3 | FBS2.4 | PREPARE TO SERVE ESPRESSO COFFEE | | ✓ | | | | | |
| 4 | FBS2.5 | MAKE ESPRESSO COFFEE | | ✓ | | | | | |
| 5 | FBS2.6 | SERVE AND PRESENT ESPRESSO COFFEE | | ✓ | | | | | |
| 6 | COS4 | USE ENGLISH AT A BASIC OPERATIONAL LEVEL | | | | | | ✓ | |
| 7 | COS5 | MAINTAIN INDUSTRY KNOWLEDGE | | | | | | ✓ | |
| 8 | GES1 | PREPARE FOR WORK | | | | | | | ✓ |
| 9 | GES5 | ORDER AND RECEIVE NEW STOCKS | | | | | | | ✓ |
| 10 | GES6 | PROMOTE & SELL PRODUCTS & SERVICES | | | | | | | ✓ |
| 11 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 12 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

## CBO3 - Certificate in Barista Operations Level 3 (13 Units)

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|-----|---------|------------|---|---|---|---|---|------|---------|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 2 | FBS1.6 | SERVE DRINKS AND ACCOMPANIMENTS | ✓ | | | | | | |
| 3 | FBS2.4 | PREPARE TO SERVE ESPRESSO COFFEE | | ✓ | | | | | |
| 4 | FBS2.5 | MAKE ESPRESSO COFFEE | | ✓ | | | | | |
| 5 | FBS2.6 | SERVE AND PRESENT ESPRESSO COFFEE | | ✓ | | | | | |
| 6 | FBS3.1 | MONITOR FOOD & BEVERAGE SERVICE | | | ✓ | | | | |
| 7 | FBS3.3 | PLAN AND MONITOR QUALITY OF ESPRESSO COFFEE | | | ✓ | | | | |
| 8 | COS4 | USE ENGLISH AT A BASIC OPERATIONAL LEVEL | | | | | | ✓ | |
| 9 | COS5 | MAINTAIN INDUSTRY KNOWLEDGE | | | | | | ✓ | |
| 10 | GES5 | ORDER AND RECEIVE NEW STOCKS | | | | | | | ✓ |
| 11 | GES6 | PROMOTE & SELL PRODUCTS & SERVICES | | | | | | | ✓ |
| 12 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 13 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

## CFBS3 - Certificate in Food & Beverage Supervision Level 3 (29 Units)

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|---|---|---|---|---|---|---|---|---|---|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.2 | TAKE RESERVATIONS | ✓ | | | | | | |
| 2 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 3 | FBS3.1 | MONITOR FOOD & BEVERAGE SERVICE | | | ✓ | | | | |
| 4 | FBS3.2 | PROVIDE SPECIALIST ADVICE ON WINE | | | ✓ | | | | |
| 5 | HRS3 | CONDUCT A STAFF PERFORMANCE REVIEW | | | ✓ | | | | |
| 6 | HRS7 | PROVIDE ON-THE-JOB COACHING | | | ✓ | | | | |
| 7 | HRS8 | DELIVER A GROUP TRAINING SESSION | | | ✓ | | | | |
| 8 | HRS9 | QUALITY ASSURE WORK IN YOUR TEAM | | | ✓ | | | | |
| 9 | HRS10 | PLAN, ALLOCATE AND MONITOR WORK OF A TEAM | | | ✓ | | | | |
| 10 | FMS4 | PREPARE & ANALYSE FINANCIAL STATEMENTS & REPORTS | | | ✓ | | | | |
| 11 | GAS5 | PLAN, MANAGE AND CONDUCT MEETINGS | | | ✓ | | | | |
| 12 | SCS3 | OPERATE BASIC SECURITY EQUIPMENT | | | ✓ | | | | |
| 13 | COS1 | USE THE TELEPHONE IN THE WORKPLACE | | | | | | ✓ | |
| 14 | COS4 | USE ENGLISH AT A BASIC OPERATIONAL LEVEL | | | | | | ✓ | |
| 15 | COS5 | MAINTAIN INDUSTRY KNOWLEDGE | | | | | | ✓ | |
| 16 | COS6 | PROVIDE BASIC FIRST AID | | | | | | ✓ | |
| 17 | COS7 | PROVIDE SAFETY AND SECURITY | | | | | | ✓ | |
| 18 | COS8 | RESPOND TO EMERGENCIES | | | | | | ✓ | |
| 19 | COS10 | USE COMMON BUSINESS TOOLS AND TECHNOLOGY | | | | | | ✓ | |
| 20 | GES2 | RECEIVE AND RESOLVE COMPLAINTS | | | | | | | ✓ |
| 21 | GES3 | CLOSE DOWN THE SHIFT | | | | | | | ✓ |
| 22 | GES5 | ORDER AND RECEIVE NEW STOCKS | | | | | | | ✓ |
| 23 | GES6 | PROMOTE & SELL PRODUCTS & SERVICES | | | | | | | ✓ |
| 24 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 25 | GES9 | DEVELOP GUEST RELATIONSHIPS | | | | | | | ✓ |
| 26 | GES10 | PREPARE AND PRESENT REPORTS | | | | | | | ✓ |
| 27 | GES14 | PREVENT, CONTROL AND FIGHT FIRES | | | | | | | ✓ |
| 28 | GES15 | DEAL WITH INTOXICATED AND UNAUTHORIZED PERSONS | | | | | | | ✓ |
| 29 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

**CWS3 - Certificate Wine Service Level 3 (11 Units)**

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|-----|---------|-----------|---|---|---|---|---|------|---------|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS1.3 | WELCOME AND RECEIVE GUESTS | ✓ | | | | | | |
| 2 | FBS1.6 | SERVE DRINKS AND ACCOMPANIMENTS | ✓ | | | | | | |
| 3 | FBS2.2 | SERVE WINE | | ✓ | | | | | |
| 4 | FBS3.2 | PROVIDE SPECIALIST ADVICE ON WINE | | | ✓ | | | | |
| 5 | COS4 | PROCESS FINANCIAL TRANSACTIONS | | | | | | | ✓ |
| 6 | COS5 | ORDER AND RECEIVE NEW STOCKS | | | | | | | ✓ |
| 7 | GES6 | PROMOTE & SELL PRODUCTS & SERVICES | | | | | | | ✓ |
| 8 | GES8 | MAINTAIN FOOD SAFETY & HYGIENE | | | | | | | ✓ |
| 9 | GES9 | DEVELOP GUEST RELATIONSHIPS | | | | | | | ✓ |
| 10 | GES15 | DEAL WITH INTOXICATED AND UNAUTHORIZED PERSONS | | | | | | | ✓ |
| 11 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

**DFSO4 - Diploma in Food Service Operations Level 4 (25 Units)**

| Ref | Unit No | Unit Title | Levels | | | | | Core | Generic |
|-----|---------|------------|--------|---|---|---|---|------|---------|
| | | | 1 | 2 | 3 | 4 | 5 | | |
| 1 | FBS4.1 | MANAGE FOOD & BEVERAGE OPERATIONS | | | | ✓ | | | |
| 2 | HRS1 | IDENTIFY STAFF DEVELOPMENT NEEDS | | | | ✓ | | | |
| 3 | HRS4 | INITIATE AND FOLLOW DISCIPLINARY PROCEDURES | | | | ✓ | | | |
| 4 | HRS5 | RECRUIT, SELECT AND RETAIN STAFF | | | | ✓ | | | |
| 5 | HRS6 | HANDLE STAFF GRIEVANCES AND RESOLVE PROBLEMS | | | | ✓ | | | |
| 6 | HRS11 | IMPLEMENT OCCUPATIONAL HEALTH AND SAFETY PRACTICES | | | | ✓ | | | |
| 7 | FMS1 | PREPARE BUDGETS | | | | ✓ | | | |
| 8 | FMS3 | MANAGE BUDGETS | | | | ✓ | | | |
| 9 | CMS1 | MANAGE QUALITY SERVICE & CUSTOMER SATISFACTION | | | | ✓ | | | |
| 10 | CMS3 | ORGANIZE FUNCTIONS | | | | ✓ | | | |
| 11 | GAS6 | MANAGE DAILY OPERATIONS | | | | ✓ | | | |
| 12 | RTS4.7 | APPLY RESPONSIBLE TOURISM TO FOOD & BEVERAGE OPERATIONS | | | | ✓ | | | |
| 13 | HRS2 | PLAN THE WORKFORCE | | | | | ✓ | | |
| 14 | GAS3 | ESTABLISH POLICIES AND PROCEDURES | | | | | ✓ | | |
| 15 | COS1 | USE THE TELEPHONE IN THE WORKPLACE | | | | | | ✓ | |
| 16 | COS6 | PROVIDE BASIC FIRST AID | | | | | | ✓ | |
| 17 | COS7 | PROVIDE SAFETY AND SECURITY | | | | | | ✓ | |
| 18 | COS8 | RESPOND TO EMERGENCIES | | | | | | ✓ | |
| 19 | COS10 | USE COMMON BUSINESS TOOLS AND TECHNOLOGY | | | | | | ✓ | |
| 20 | GES2 | RECEIVE AND RESOLVE COMPLAINTS | | | | | | | ✓ |
| 21 | GES9 | DEVELOP GUEST RELATIONSHIPS | | | | | | | ✓ |
| 22 | GES10 | PREPARE AND PRESENT REPORTS | | | | | | | ✓ |
| 23 | GES14 | PREVENT, CONTROL AND FIGHT FIRES | | | | | | | ✓ |
| 24 | GES15 | DEAL WITH INTOXICATED AND UNAUTHORIZED PERSONS | | | | | | | ✓ |
| 25 | GES21 | APPLY RESPONSIBLE FOOD & BEVERAGE PRACTICES | | | | | | | ✓ |

## III. DETAILED STANDARDS

## FBS1.1. UNIT TITLE: PREPARE THE RESTAURANT FOR FOOD SERVICE

### UNIT DESCRIPTOR

This unit covers the competencies required to prepare the restaurant prior to service. It includes the cleaning of the premises as well as individual items of equipment, before setting the restaurant, its table and work stations ready for imminent meal service so that the outlet is in complete readiness for receiving customers. All this must be done to a professional, standard, and in a hygienic and safe manner.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Clean and tidy the restaurant**
P1. Close the restaurant when the last customer has departed
P2. Clear all dirty linen and items
P3. Ventilate room for fresh air
P4. Arrange tables and chairs for dusting and cleaning
P5. Reallocate tables and chairs following the restaurant layout

**E2. Clean and prepare utensils**
P6. Collect items from the stewarding area or storage area
P7. Prepare the area where cleaning will take place and gather equipment needed
P8. Clean utensils and condiments and check condition

**E3. Prepare a table and fold napkins**
P9. Select and place cloth correctly
P10. Fold and place napkins in designated area

**E4. Prepare condiments**
P11. Check and refill condiments as required and check condition
P12. Check the external appearance of silver, ceramic or glass condiment holders

**E5. Lay up MeP**
P13. Prepare the place settings for transport on a service tray
P14. Lay the table one place at a time
P15. Review table layout to ensure all is in order

**E6. Ensure restaurant readiness**
P16. Check air condition, lighting, and music are fully functioning
P17. Check table decoration is placed correctly

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### KNOWLEDGE REQUIREMENTS

K1. Describe the procedure for cleaning and tidying the restaurant when opening and closing
K2. Describe the sequence of polishing cutlery, glassware and crockery
K3. Explain the purpose of each type of cutlery, glassware and crockery
K4. Describe food safety and hygiene procedures when preparing condiments

K5. Describe the process of laying and boxing a table cloth
K6. Identify suitable condiments for different meals
K7. Describe different types of table setting
K8. List necessary items in order at service station
K9. Explain the reason of having double checks when the restaurant preparation is completed

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Restaurant preparation according to standards may include:**
- Tables
- Chairs
- Trolleys
- Caution board
- Linen

**2. Clean and prepare utensils may include:**
- Cutlery
- Glassware
- Crockery
- Tray

**3. Condiments may include:**
- Salt & Pepper
- Oil and vinegar
- Mustard
- Soya sauce
- Fish sauce

**4. Lay up MeP may include:**
- Lay up MeP à la carte
- Lay up MeP table d'hôte
- Lay up MeP Asian table setting
- Lay up MeP Western table setting
- Lay up MeP breakfast
- Lay up MeP buffet
- Lay up buffet table
- Lay up MeP service station

**5. Restaurant preparation depends on:**
- Meal of the day
- Meal reservation
- Customer or group booking

## ASSESSMENT GUIDE

**Evidence of the following is required:**
1. Three occasions of cleaning and preparing the restaurant for service
2. Two occasions of cleaning and preparing utensils for lay up
3. Three occasions preparing tables and folding napkins correctly
4. Two occasions of preparing condiments
5. Three occasions of different MeP from: à la carte, table d'hôte, Asian table setting, Western table setting, breakfast or buffet

## ASSESSMENT METHODS

**This unit may be assessed on or off the job.**
1. Assessment can include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge.
2. Assessment must relate to the individual's work area or area of responsibility.

**The following methods may be used to assess competency for this unit:**
- Observation of practical candidate performance
- Recorded oral and/or written questions
- Third party reports completed by a supervisor
- Practical project or assignment

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | D1.HBS.CL5.01 |

# FBS1.2. UNIT TITLE: TAKE RESERVATIONS

## UNIT DESCRIPTOR

This unit covers the competencies required for taking customer orders in the manner prescribed by the establishment, maintaining a positive and courteous relationship with customers, accurately recording details, taking opportunities to sell products and services and communicating the order to the requisite areas of the operation.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Take a reservation**
P1. Take a reservation by phone or face to face
P2. Record all booking information
P3. Confirm booking details and conclude the reservation

**E2. Communicate details**
P4. Communicate with colleagues or supervisor
P5. Post reservation into record system

### KNOWLEDGE REQUIREMENTS

K1. Describe telephone answering techniques and how to deal with different questions
K2. Explain the importance of taking notes and not interrupting the customer when speaking
K3. Identify the Dos and Don'ts when taking reservations

K4. List the information needed to be taken from customer
K5. Explain why the reservation must be posted and communicated

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Prepare to take a reservation may include:**
· Prepare stationary
· Check restaurant reservation status record

**2. Answer the telephone and take a reservation:**
· Answer promptly
· Greet customer appropriately
· Speak slowly, clearly and carefully (if on the phone)

**3. The information required for the booking should include:**
· Booker's name
· Contact email and phone number
· Company or personal address
· Number of customer
· Time and date of meal booked
· Menu and price
· Special request

**4. Communicate should include:**
· Record on logbook clearly
· Post reservation on record system
· Communicate with responsible colleague or supervisor

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:** <br> 1. Three food and beverage reservations taken via the phone and posted accurately <br> 2. Three food and beverage reservations taken face to face and followed up accurately <br> 3. Two communications with colleagues documented as evidence | **This unit may be assessed on or off the job:** <br> • Assessment can include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge <br> • Assessment must relate to the individual's work area or area of responsibility <br><br> **The following methods may be used to assess competency for this unit:** <br> • Observation of practical candidate performance <br> • Recorded oral and/or written questions <br> • Third party reports completed by a supervisor <br> • Practical project or assignment |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | D1.HBS.CL5.16 |

# FBS1.3. UNIT TITLE: WELCOME AND RECEIVE GUESTS

## UNIT DESCRIPTOR

This unit covers the competencies required for welcoming and receiving guests/customers. It includes updating customer information and dealing with customer enquiries.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Update customer information**
P1. Check customer information from record system
P2. Update relevant customer information
P3. Clarify any information as necessary

**E2. Welcome and receive customer**
P4. Greet and welcome customer warmly and politely
P5. Escort customer to their table or location
P6. Seat the customer(s)
P7. Ask customer for their requirements

**E3. Deal with customer enquiries**
P8. Listen carefully and respond courteously to the customer's enquiry
P9. Report problems to a supervisor or suitable person

### KNOWLEDGE REQUIREMENTS

K1. Describe the sequence of procedures when welcoming and receiving customers
K2. List the standards that apply to welcoming and receiving different types of customer

K3. Identify what professional behaviours are required for welcoming and greeting customers

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Customer records might include:**
  · The information record on the logbook, computer or on the information board/notice board

**2. Customers could include:**
  · VIP, male or female, returning customer, partner, client, visitor, inspector, individual or group or company, elderly or young people

**3. Preparation to welcome and receive customer could include:**
  · Welcome drink
  · Towel/napkin
  · Welcome card
  · Welcome flower
  · Fruit
  · Person in charge
  · Clear and clean entrance
  · Umbrella
  · Security guard

**4. Styles of welcoming and receiving customer may include:**
  · Formal or informal style
  · Vietnam local style or appropriate style to the customer
  · Special style according to request of customer
  · Special Banner

**5. Customer enquiries could include:**
  · Questions about meal, drink, meeting etc.
  · In some situations the supervisor or manager on duty will handle customer enquiries

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br>1. Two occasions of welcoming and receiving individual guest<br>2. Two occasions of welcoming and receiving group<br>3. Four occasions of dealing with client's inquiries | **This unit may be assessed on or off the job:**<br>Assessment can include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge.<br><br>Assessment must relate to the individual's work area or area of responsibility the following methods may be used to assess competency for this unit:<br>• Observation of practical candidate performance<br>• Recorded oral and/or written questions<br>• Third party reports completed by a supervisor<br>• Practical project or assignment |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress, Team Leader, Supervisor | D1.HBS.CL5.10 |

## FBS1.4. UNIT TITLE: TAKE AND PLACE AN ORDER

### UNIT DESCRIPTOR

This unit covers the competencies required for taking customer orders in the manner prescribed by the establishment, maintaining a positive and courteous relationship with customers, accurately recording details, taking opportunities to sell products and services and communicating the order to the requisite areas of the operation.

---

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Take a food/drink order**
P1.  Record the order
P2.  Write down additional information
P3.  Sell other products
P4.  Confirm the order
P5.  Collect the menus

**E2.  Communicate the order**
P6.  Check the written order is clear
P7.  Transfer the order to the cashier function
P8.  Transfer the order to the kitchen
P9.  Transfer the order to the dispense bar
P10.  Retain the order for service staff

---

### KNOWLEDGE REQUIREMENTS

K1.  Describe procedure of order taking.
K2.  Describe procedure of communicating order
K3.  State information needed to be taken from customer
K4.  Explain the importance of repeating the order.

K5.  Explain how to maintain a positive and courteous relationship with customer
K6.  Describe how to transfer the order and record the order for service staff
K7.  Describe the main elements of the food menu including starters, main course, desserts etc.
K8.  Describe the elements of the drink menu including basic wine information

---

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Taking a food/drink order may include:**
   - Discussing and clarifying with the customer
   - Advising on menu items
   - Recommending dishes or drinks
   - Up-selling special menu items

**2.  Communicating the order may include:**
   - Prioritising food items per customer requests
   - Conveying and special needs (dietary or other)
   - Ensuring orders are recorded and filed correctly for billing
   - Requesting progress on delayed orders to convey information to customers on progress

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br>1. Four food and drink orders taken correctly<br>2. Four orders communicated clearly and correctly to the kitchen and/or dispense bar | **This unit may be assessed on or off the job:**<br>1. Assessment can include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge<br>2. Assessment must relate to the individual's work area or area of responsibility<br><br>**The following methods may be used to assess competency for this unit:**<br>• Observation of practical candidate performance<br>• Recorded oral and/or written questions<br>• Third party reports completed by a supervisor<br>• Practical project or assignment |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | D1.HBS.CL5.12 |

# FBS1.5. UNIT TITLE: SERVE FOOD AT TABLE

## UNIT DESCRIPTOR

This unit covers the competencies required to perform routine table duties for the customer linked to the service of the meal itself (such as food table service and table dressing) with professional courtesy and efficiency.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Serve customers at table**

P1.  Carry food with correct skills and with correct containers

P2.  Provide customers with the service items, condiments and accompaniments appropriate to their food

P3.  Serve customers in line with service style

P4.  Introduce food before serving customers

P5.  Serve food items with clean, hygienic and undamaged equipment of the appropriate type

P6.  Serve customer with extra requests

**E2.  Provide customer service**

P7.  Respond to service problems appropriately

P8.  Ensure customer dining and service areas are tidy, hygienic and free from rubbish and food debris

P9.  Clear customer dining areas of soiled and unused service items at the appropriate times

P10.  Maintain sufficient stocks of clean service items, condiments and accompaniments throughout the service

### KNOWLEDGE REQUIREMENTS

K1.  Describe procedures for carrying food and serving food at table according to the property's standards.

K2.  Explain the appropriate service items, condiments and accompaniments to different food requirements

K3.  Describe the procedure for handling customer problems or complaints

K4.  Describe the procedure for maintaining restaurant dining and service areas

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Service problems may include:**
- Complaints about slow service
- Complaints about quality, amount, appearance or taste of food
- Complaints about incorrect order
- Complaints about bill or payment
- Complaints about service quality
- Complaints about table cleanliness or setting

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br>1. Four occasions of carrying and serving food at table according to the property's standards.<br>2. Two occasions of serving customers with extra requests<br>3. Three customer service problems resolved adequately<br>4. Two occasions of maintaining dining and service area according to procedures | · Observation of practical candidate performance<br>· Practical exercises that reflect the workplace use of the facilities & equipment<br>· Oral and/or written questions and/or multiple choice test<br>· Third party reports completed by a supervisor<br>· Project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | D1.HBS.CL5.14 |

## FBS1.6. UNIT TITLE: SERVE DRINKS AND ACCOMPANIMENTS

### UNIT DESCRIPTOR

This unit covers the competencies required to perform drink service as part of the service of the meal itself.

---

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Introduce and serve drinks and accompaniments**
P1.  Prepare drink ordered by customer
P2.  Introduce drink before serving
P3.  Serve drinks in line with the appropriate service style and legal requirements
P4.  Answer any customer queries

**E2.  Maintain customer and service areas during drinks service**
P5.  Keep service areas equipment clean hygienic, tidy and ready to use
P6.  Keep customer and service areas clean tidy and free from rubbish
P7.  Secure service areas against unauthorized access
P8.  Serve customer with extra requests

---

### KNOWLEDGE REQUIREMENTS

K1.  Describe the correct way to open capped, screw top and corked bottles and how to use the appropriate equipment
K2.  State why the name on bottle should be left facing the customer
K3.  Describe the correct way to pour and serve drink
K4.  Describe the correct way to pour and serve different drinks for free pouring such as spirits and mixers

K5.  Describe types of glasses available to serve drinks and which ones to use according to organisation's procedures and customer requirements
K6.  State correct temperature for different types of drinks
K7.  State the property's policies and procedures in serving drinks
K8.  Explain the safety and hygiene knowledge when preparing equipment and ingredients
K9.  Describe how to ensure safety and security at work

---

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  The drink service at the table according to standards may include:**
· Opening capped, screw top and corked bottles with appropriate equipment
· Pouring and serving free pouring drinks such as spirits and mixers
· Using correct glasses according to types of drinks
· Ensuring correct temperature for different types of drinks

**2.  Maintaining customer and service areas during drinks service may include:**
· Ensuring clean and tidy areas at all time
· Removing rubbish
· Replenishing accompaniments
· Ensuring safety and hygiene when preparing equipment and ingredients
· Ensuring safety and security in the workplace

**3.  Extra requests may include:**
· Additional accompaniments
· Napkins, toothpicks, salt and pepper
· Cigarettes
· Extra ice or water

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:** <br> 1. Four occasions of introducing and serving drinks and accompaniments <br> 2. Two occasions of serving customers with extra requests <br> 3. Three customer service problems resolved adequately <br> 4. Two occasions of maintaining service area according to procedures | · Observation of practical candidate performance <br> · Practical exercises that reflect the workplace use of the facilities & equipment <br> · Oral and/or written questions and/or multiple choice test <br> · Third party reports completed by a supervisor <br> · Project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | D1.HBS.CL5.07 |

# FBS1.7. UNIT TITLE: CLEAR TABLE

## UNIT DESCRIPTOR

This unit covers the competencies required to clear the table in a restaurant of food outlet. It includes buffet, mid-meal dressing service and ensuring clean and tidy table.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Perform mid-meal dressing**

P1.  Observe customers and identify when to carry out mid-meal dressing

P2.  Carry out mid-meal dressing and set accompaniments

**E2.  Deal with table spillages**

P3.  Ensure safety and hygiene for the customer and self

P4.  Inform the supervisor or manager if needed

P5.  Assist the customer as necessary

P6.  Use the correct tools to clean the table

**E3.  Clear table at end of meal**

P7.  Clear table in clockwise direction using tray or trolley

P8.  Ensure table is clean and tidy ready for coffee or drinks

---

### KNOWLEDGE REQUIREMENTS

K1.  Describe company procedures for clearing table

K2.  Identify requirements when clearing buffet

K3.  Describe how to carry out mid-meal dressing

K4.  Describe how to change an ashtray

K5.  Explain standards and procedures to deal with table spillages

K6.  Describe safety and hygiene procedures

---

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Mid-meal dressing may include:**
- Cleaning table of debris or spillages
- Topping up condiments
- Offering to provide any other requirements

**2.  Clearing table may require:**
- Using tray or trolley to clear
- Clearing plates in clockwise direction
- Place large and heavy items at the bottom
- Not trying to carry too many plates for safety reasons

**3.  Clear buffets may include:**
- Check number of customer using service
- Observe the buffet before clearing and inform guests when buffet is due to close
- Inform the supervisor of any change
- Follow standards and procedures

**4.  Dealing with table spillages may involve:**
- Ensure safety and security for the customer and yourselves
- Keeping calm and responding politely
- Informing the supervisor or manager if needed
- Assisting the customer as necessary
- Using the correct tools to clean

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br>1. Four occasions clearing table correctly.<br>2. Two occasions of dealing with spillages<br>3. Three occasions of mid-meal dressing<br>4. Two occasions of maintaining service area according to procedures | **This unit may be assessed on or off the job:**<br>• Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge<br>• Assessment must relate to the individual's work area or area of responsibility<br><br>**The following methods may be used to assess competency for this unit:**<br>• Case studies<br>• Observation of practical candidate performance<br>• Practical exercises that reflect the workplace use of the facilities & equipment<br>• Recorded oral test and/or written questions<br>• Third party reports completed by a supervisor<br>• Project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | N/A |

# FBS1.8. UNIT TITLE: PROVIDE ROOM SERVICE

## UNIT DESCRIPTOR

This unit covers the competencies required to provide room service in a hotel or other accommodation establishment.

---

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Take the order**

P1.  Ensure the order is correctly recorded and from the room service menu

P2.  Inform guests how long it will take to deliver their order

P3.  Recommend other items to complete the guest order

P4.  Follow up and communicate if there are any special requests

**E2.  Prepare and serve room service**

P5.  Check dishes to ensure the order is correct and presented well

P6.  Use proper containers and equipment to carry to the room

P7.  Serve the guest according to established standards and procedures

P8.  Deal with any problems with the order at the time of delivery of the order

**E3.  Present room service accounts**

P9.  Confirm the receipt includes correct guest information

P10.  Retain the signed receipt

P11.  Notify supervisor of any problems or concerns

P12.  Pass signed receipt to accountant/cashier

**E4.  Clear room service**

P13.  Estimate suitable time to clear

P14.  Check with guest before clearing

P15.  Ensure the standards and procedures for clearing room service are applied

**E5.  Maintain room service equipment ready for service**

P16.  Check the cleanliness of the equipment

P17.  Place equipment in designated place

P18.  Check there are sufficient quantities for later service

---

### KNOWLEDGE REQUIREMENTS

K1.  List essential information when taking the room service order

K2.  Describe the standards and procedures for room service

K3.  Explain the procedures to handle situations or problems at room service

K4.  State the way to present the room service receipt and where the signed receipt should be taken

K5.  Identify requirements of maintaining room service equipment

---

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Take a room service order may include:**
- Room service menu
- Guest orders food outside of the room service menu
- Rooming list/in-house guest list
- Delays by kitchen and need to inform guest of progress

**2.  Prepare for room service may include:**
- Prepare and check correct order
- Check if sufficient accompaniments

**3.  Maintain room service equipment ready for service may include:**
- Ensuring sufficient utensils and linen
- Ensuring sufficient trays and condiments

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br>1. Three cases of taking room service order<br>2. Three cases of preparation of room service orders<br>3. Three cases of serving room service and presenting the bill<br>4. Three cases of clearing room service and storing room service equipment | **This unit may be assessed on or off the job:**<br>Assessment can include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge<br><br>Assessment must relate to the individual's work area or area of responsibility<br><br>**The following methods may be used to assess competency for this unit:**<br>· Observation of practical candidate performance<br>· Practical exercises that reflect the workplace use of the facilities & equipment<br>· Recorded oral test, written questions and/or multiple choice test<br>· Third party reports completed by a supervisor<br>· Practical project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | D1.HBS.CL5.13 |

# FBS1.9. UNIT TITLE: PROVIDE BANQUET AND CONFERENCE SERVICE

## UNIT DESCRIPTOR

This unit covers the competencies required to provide banquet and conference service. It includes setting up the banquet or conference and providing service during the event.

---

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Lay up banquet or conference**
P1.    Check the event order information
P2.    Prepare facility, utensils and systems for banquet setting
P3.    Communicate with other departments to complete conference or banquet setup
P4.    Arrange the event according to style and standard required

**E2.  Perform service for banquet or conference**
P5.    Serve food and drinks
P6.    Take care of, and support guests requirements during the service
P7.    Keep the service area private, tidy and safe

**E3.  Clear the event on completion of service**
P8.    Clear tables of food, condiments and utensils
P9.    Return room to original setting for next event

---

### KNOWLEDGE REQUIREMENTS

K1.    Describe the standards and procedures of lay up for banquets and conference
K2.    Explain the important of the final check when the banquets and conference setup is completed
K3.    List the sequence procedures when serving at banquets
K4.    List the typical drinks and canapés often available for fingers buffet
K5.    Identify the best times to supply supplementary drinks and canapés

K6.    State the standards and procedures when serving tea and coffee
K7.    Describe the correct service standard for wine and alcoholic drinks
K8.    List the duties to be completed during the conference break
K9.    Identify when the supervisor or manager should be informed or any issues

---

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Drinks and canapé service for finger buffets could include:**
  • Preparing the correct drinks and canapés as per requested
  • Serving drinks and canapés according to finger buffet style
  • Providing supplementary drinks and canapés as per the established standards

**2.  Setting tables for conferences would include:**
  • Following the instructions to setup for the conference style
  • Meeting the established standards of setting up table and stationary for conference
  • Carrying out final check when the conference setup is completed

**3.  Systems could include:**
  • Air conditioning
  • Lighting
  • Music
  • Table settings/decoration

## CONDITIONS OF PERFORMANCE AND VARIABLES

**4. Servicing conferences during breaks could include:**
- Providing quick rearrangement/adjustment to keep conference rooms tidy
- Supplying supplemental stationary and mineral water as per requested
- Preparing tea/coffee as per requested
- Checking accompaniments and ingredients for tea and coffee
- Serving tea and coffee according to finger buffet

**5. Performing counter service could include:**
- Keeping the counter fully stocked
- Ensuring all facilities, equipment, and accompaniments for hot or cold drink and hot food or cold food are available

## ASSESSMENT GUIDE

**Evidence of the following is required:**
1. Two occasions of set up the two different banquet styles
2. Three occasions of serving banquet to each banquet style
3. Two occasions of serving finger buffets
4. Two occasions of preparation for conference
5. Three occasions of serving tea/coffee for meeting breaks

## ASSESSMENT METHODS

**This unit may be assessed on or off the job:**

Assessment can include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge

Assessment must relate to the individual's work area or area of responsibility

**The following methods may be used to assess competency for this unit:**

- Observation of practical candidate performance
- Recorded oral and/or written questions and/or multiple choice test
- Third party reports completed by a supervisor
- Practical project and assignment work

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage Waiter/Waitress | N/A |

## FBS2.1. UNIT TITLE: OPERATE A BAR

### UNIT DESCRIPTOR

This unit covers the competencies required to operate a bar from opening, providing bar service and close a bar operation.

---

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Prepare and restock the bar**
P1.   Switch on all bar equipment
P2.   Clean facility, equipment, accompaniments and utensils
P3.   Check stock levels as par stock and top up stock according to FIFO (First-in – First-out) standards

**E2.  Serve alcoholic and non-alcoholic drinks**
P4.   Serve drinks according to service and quality standards
P5.   Ensure appropriate accompaniments are served with drinks
P6.   Monitor customer behaviour to anticipate any drink-related problems
P7.   Handle customer enquiries or problems according to company procedures
P8.   Ensure empty bottles and cans are disposed of in correct containers
P9.   Handle financial transactions

**E3.  Close down bar operations**
P10.  Clean and tidy up the bar
P11.  Complete daily inventory report
P12.  Record any incidents in the logbook for the next shift
P13.  Inform supervisor or manager of any problems or incidents
P14.  Turn off equipment

---

### KNOWLEDGE REQUIREMENTS

K1.   Explain the procedure for restocking the bar
K2.   State standards, procedures and regulations for serving alcoholic drinks
K3.   List popular types of beer are available at the property
K4.   Identify wines, liquors, spirits are available at the property
K5.   Describe the types of cocktails and mocktails served at the property

K6.   Explain how you would respond to drunken customer behaviour and drink-related problems
K7.   Explain how you handle customer enquiries or other problems
K8.   Describe the procedures to close down bar operations
K9.   Explain FIFO procedure

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Serve drinks according to service and quality standards may include:**
- Ensuring drinks are served in appropriate measures
- Ensuring drinks are served in correct glasses at correct temperatures
- Confirming orders to ensure accurate drink orders provided

**2. Ensure appropriate accompaniments are served with drinks could include:**
- Providing accompaniments alongside drinks
- Providing accompaniments to decorate drinks such as fruits slices for cocktails

**3. Monitor customer behaviour to anticipate any drink-related problems could include:**
- Observing noisy or rowdy customers and anticipating actions to take
- Deciding when to intervene or talk to customers, or whether to involve others

**4. Handle customer enquiries or problems according to company procedures could include:**
- Complaints about slow service
- Complaints about quality, amount, appearance or taste of drink
- Complaints about incorrect order
- Complaints about bill or payment
- Complaints about service quality
- Complaints about table cleanliness or setting
- Complaints about other guests (noisy, drunk, abusive etc)

## ASSESSMENT GUIDE

**Evidence of the following is required:**
1. Two occasions of preparing and re-stocking the bar correctly
2. Four occasions of preparing cocktails and mocktails
3. Three occasions of serving wine, beer and spirits
4. Two occasions of dealing with drink-related problems or other customer problems/complaints
5. Two reports for shift handover or for supervisor/manager

## ASSESSMENT METHODS

**This unit may be assessed on or off the job:**

Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge.

Assessment must relate to the individual's work area or area of responsibility.

**The following methods may be used to assess competency for this unit:**
- Case studies
- Observation of practical candidate performance
- Practical exercises that reflect the workplace use of the facilities & equipment
- Recorded oral test and/or written questions
- Third party reports completed by a supervisor
- Project and assignment work

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Barman/Barwoman, Assistant Barman, Drinks waiter | D1.HBS.CL5.04-08 |

# FBS2.2. UNIT TITLE: SERVE WINE

## UNIT DESCRIPTOR

This unit covers the competencies for selling and serving wine for customers at the dining table.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.    Introduce wine list**
P1.    Present wine list to the customer
P2.    Provide accurate wine information to meet the requirements of the customer
P3.    Make recommendations for wind and food pairing
P4.    Refer customer queries to a senior person if unable to answer the query

**E2.    Provide customer service**
P5.    Establish rapport with the customer and maintain it throughout the service
P6.    Take the opportunity to maximise sales through up-selling
P7.    Take customer orders according to organisation's procedures

**E3.    Serve wine**
P8.    Prepare glasses, wine opener, and ice bucket if required
P9.    Serve wine professionally as per property's policies, standards and procedures

### KNOWLEDGE REQUIREMENTS

K1.    Describe main white and red wines and their features and taste
K2.    List the main wine producers and the most popular wines in your establishment
K3.    Explain which wines might match different foods

K4.    Describe the process for opening and pouring wine
K5.    Describe how you maintain customer service and maximise sales through up-selling

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Opening wine would include the following:**
  · Show the bottle of the wine to confirm the right bottle ordered before serving guests
  · Place bottle on the table and cut the foil around cork (if corked)
  · Wrap service napkin securely around the bottle neck
  · Hold the bottle neck firmly in one hand and with the other grip the cork head
  · Insert corkscrew and turn firmly to the right
  · Turn the cork a few degrees until it begins to rise by itself

**2.  Serving wine would include:**
  · Pour a small amount of wine for the host
  · Serve ladies first then pour for others in a clockwise direction
  · Pour for the host last
  · Place the bottle on the table with the label facing the host
  · Place white wine or champagnes in an ice bucket (with stand if required)

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br>1. Three occasions of presenting the wine list and advising on wines to accompany foods<br>2. Four occasions of preparing and serving wine<br>3. Two occasions of up-selling products | **This unit may be assessed on or off the job:**<br>Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge<br><br>Assessment must relate to the individual's work area or area of responsibility<br><br>**The following methods may be used to assess competency for this unit:**<br>• Observation of practical candidate performance<br>• Practical exercises that reflect the workplace use of the facilities & equipment<br>• Recorded oral test and/or written questions<br>• Third party reports completed by a supervisor<br>• Project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Wine Waiter, Captain, Restaurant Supervisor, General Waiter | D1.HBS.CL5.15 |

## FBS2.3. UNIT TITLE: PREPARE AND SERVE COCKTAILS

### UNIT DESCRIPTOR

This unit describes the skills and knowledge required to prepare and serve cocktails for customers in food and beverage outlets.

---

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Promote the sale of cocktails**

P1. Encourage customers to buy cocktails according to property's policy

P2. Use bar menu and tent cards appropriately to promote cocktails

P3. Offer customers accurate information in a courteous manner about the style and range of cocktails

**E2. Prepare cocktails**

P4. Select correct cocktail glassware and equipment

P5. Make cocktails correctly and efficiently according to establishment and international standard recipes

P6. Consider eye appeal, texture, flavour and required temperature in preparing cocktails

P7. Consider options for new cocktails using suitable combinations of alcoholic and non-alcoholic

**E3. Present cocktails.**

P8. Present cocktails attractively and maximise eye appeal

P9. Use garnishes and decorations according to establishment policies, standards and procedures

P10. Avoid wastage and spillage during service

---

### KNOWLEDGE REQUIREMENTS

K1. Describe recipes for the most popular traditional cocktails

K2. List the most popular methods used for making cocktails

K3. List the typical alcoholic ingredients of cocktails

K4. List the typical non-alcoholic ingredients of cocktails

K5. Describe the range and variety of cocktail making equipment

K6. Describe the accompaniments used for cocktails

K7. Outline the range and variety of cocktail glassware

K8. Explain the hygiene and safety requirements in preparing and serving cocktails

K9. Explain the origins, nature and characteristics of:
- Spirits and liqueurs
- Vermouths, bitters and fortified wine

---

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **Preparing blended cocktail should include the following:**
   - Ensuring the mise-en-place of fruit and garnishes is ready before commencing task
   - Placing the listed ingredients for specific cocktail recipes in the cocktail blender followed by crushed ice
   - Measuring quantities using standard measures
   - Blending the mixture vigorously until well mixed, chilled and aerated
   - Serving immediately in the appropriate glass
   - Garnishing attractively according to recipe recommendations

2. **Preparing mixed cocktail should include the following:**
   - Place ice into measuring jug
   - Add the measured ingredients as per specific recipe
   - Stir with a cocktail spoon
   - Served into appropriate glass using a Hawthorn strainer to retain ice
   - Garnish attractively according to recipe recommendations

3. **Preparing layered cocktail should include the following:**
   - Depending on the recipe add the specific ingredients gently one by one to the appropriate glass
   - Garnish attractively according to recipe recommendations

4. **Serving cocktail should include:**
   - Carefully placing garnished cocktail on a clean serving tray
   - Carry the tray in front by balancing on one hand
   - Confirm order to ensure accurate drink order is provided
   - Remove other unused glasses and place cocktail in front of guest
   - Ensure appropriate accompaniments are served with cocktail

5. **Serving equipment may include:**
   - Cocktail shakers
   - Cocktail glassware
   - Mixing glass/jugs
   - Cocktail spoon
   - Water jugs
   - Stirrers and swizzles
   - Blenders
   - Drink mixer
   - Measures
   - Pourers, strainers and funnel
   - Ice crushing machine
   - Scoops, tongs
   - Coasters
   - Bottle opener
   - Lemon squeezer
   - Cocktail & swizzle sticks
   - Cocktail list or menu
   - Bar towels, serviettes and service cloths
   - Cleaning equipment
   - Knives and cutting boards
   - Refrigerator
   - Sink unit and bar glass washing machine
   - Others

6. **Cocktail ingredients and accompaniments may include:**
   - Ice cubes
   - Sauces
   - Fruit juices
   - Milk
   - Cream
   - Decorative items
   - Alcoholic ingredients
   - Fresh fruits (lemon, lime oranges and others), maraschino cherries
   - Salt
   - Pepper powder
   - Sugar
   - Bitters
   - Garnishes (umbrellas and straws)

7. **Recommendations or information may include:**
   - Price
   - Special promotions
   - Ingredients
   - Suitable alternatives
   - Flavours
   - Spirit base
   - Others

## CONDITIONS OF PERFORMANCE AND VARIABLES

**8. Styles of cocktails may include:**
- Blended
- Shaken
- Mixed
- Layered
- Stirred
- Built

**9. Cocktail glassware may include:**
- Martini glass
- Brandy sniffer
- Champagne flute
- Old – fashioned glass
- Margarita glass
- Highball glass
- Irish coffee glass
- Others

## ASSESSMENT GUIDE

**Evidence of the following is required:**
1. Three occasions of presenting the cocktail list and advising on variety of cocktails
2. Four occasions of preparing and serving cocktails correctly
3. Two occasions of up-selling products

## ASSESSMENT METHODS

**This unit may be assessed on or off the job:**

Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge

Assessment must relate to the individual's work area or area of responsibility

**The following methods may be used to assess competency for this unit:**

- Observation of practical candidate performance of preparing and serving cocktails
- Practical exercises that reflect the preparation of quantities of cocktails within industry-realistic timeframes.
- Practical exercises that reflect the workplace use of the facilities & equipment
- Recorded oral test and/or written answers to questions to assess knowledge requirements
- Third party reports completed by a supervisor
- Project and assignment work

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Bar Man, Head Barman, Restaurant Supervisor | D1.HBS.CL5.06 |

## FBS2.4. UNIT TITLE: PREPARE TO SERVE ESPRESSO COFFEE

### UNIT DESCRIPTOR

This unit covers the competencies required to organise and prepare the work areas ready for serving espresso coffee, providing customers with advice on espresso coffee and promoting and providing information on espresso coffee choices.

---

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Organise and prepare work areas**

P1. Organise coffee workstation according to workplace safety and hygiene practices, to enable efficient work flow and easy access to equipment and commodities

P2. Develop preparation and work routines according to requirements

P3. Complete mise en place and preparation for coffee service according to procedures

P4. Store coffee and commodities in appropriate airtight containers and conditions to maintain quality and freshness, according to workplace hygiene procedures and food safety regulations

**E2. Provide customer service and advise customers on espresso coffee**

P5. Develop and update knowledge of types of coffee beverages

P6. Respond to customer questions about espresso coffee beverages

P7. Provide advice to customers about coffee types and characteristics where appropriate

**E3. Develop and promote coffee information**

P8. Determine customer coffee preferences and requirements, and offer coffee style choices and accompaniments accordingly

P9. Promote coffee beverage appreciation at appropriate opportunities

P10. Develop and display accurate customer information on espresso coffee beverages

---

### KNOWLEDGE REQUIREMENTS

K1. Review the history and culture of espresso coffee beverages

K2. List the major coffee styles and their characteristics

K3. Describe the types of bean, blends and roasts with a particular emphasis on espresso roast

K4. State the types of grind and grinding equipment

K5. Describe the types of machines and equipment and their main features and differences

K6. Describe the sizes and types of filter baskets, tampers and other equipment

K7. List the different milk types and their characteristics, including requirements for handling and storing milk

K8. Describe the storage conditions and requirements for coffee and commodities

K9. State the sequencing and production of orders

K10. Describe the current and emerging espresso coffee service trends

K11. Describe the major types of espresso coffee beverages and their characteristics:
- Caffe latte
- Cappuccino
- Espresso (short black)
- Flat white
- Long black
- Mocha
- Piccolo latte
- Ristretto
- Short and long macchiato

K12. Describe the special qualities and flavour characteristics arising from country and area of origin:
- Physical and chemical properties
- Roasting techniques
- Effects of roasting and grinding
- Type of grind and freshness
- Flavour enhancers and essences

K13. Describe the most effective ways to develop and promotional coffee information

K14. Evaluate the benefits of each promotional method

---

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Equipment may include:**
- Types and brands of coffee grinders or mills and coffee machines
- Serviceware, including cups, saucers, mugs and glasses of various sizes
- Flatware
- Weighing equipment
- Measuring equipment
- Tampers
- Blind or blank filter and espresso cleaning detergent
- Thermometer
- Etorage bins in appropriate sizes and materials
- Bins for discarded pucks.

**2. Procedures may include:**
- Policies and procedures related to persons authorised and trained to carry out particular activities related to machine operation, adjustment, cleaning and maintenance
- Circumstances requiring the services of an authorised and trained technician
- Specific requirements for routine and non-routine cleaning and maintenance
- Requirements for checking and replacing parts and equipment
- Specific requirements for decoration of coffee prior to presentation, such as stencils, logos, sprinkled toppings and coffee art
- Policies and procedures for stock control, ordering and rotation.

**3. Mise en place and preparation for coffee service include:**
- Turning on machines to achieve correct pressure and temperature
- Setting out cups, mugs, saucers, plates, jugs, glasses and other required serviceware
- Ensuring adequate supplies of coffee, milk varieties and sugars, including specialised sugars and substitutes
- Assembling flavourings and toppings
- Laying out flatware, serviettes and wipes

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Performance evidence must include:** | Assessment must take place in the workplace or coffee laboratory in a vocational education environment. |
| 1. Three occasions of completing mise en place, organising the workplace and preparation for coffee service according to workplace safety and hygiene practices | **The methods of assessment could include:** |
| 2. Three occasions of providing customer service and advice to customers on espresso coffee, coffee types and characteristics, and responding to customer questions about espresso coffee beverages. | · Observation of performance<br>· Work records<br>· Witness statement from supervisor of competent performance |
| 3. Developing and promote coffee information including: | **Assessment must ensure:** |
| · Two occasions of determining customer coffee preferences and requirements, and offering coffee style choices and accompaniments accordingly | · Access to a workstation with industry-current commercial espresso machine and appropriate equipment, including: |
| · Two occasions of promoting coffee beverage appreciation at appropriate opportunities | · Thermometer<br>· Coffee grinders or mills<br>· Serviceware, including cups, saucers, glasses, mugs and flatware<br>· Weighing and measuring equipment<br>· Storage bins in appropriate sizes and materials<br>· Blind or blank filters<br>· Tampers<br>· Espresso cleaning detergent<br>· Bins for discarded pucks or grind tubes |
| · Two occasions of developing and displaying accurate customer information on espresso coffee beverages | · Access to a range of coffee types and commodities<br>· Preparation of quantities of coffee items within industry-realistic timeframes for multiple customers simultaneously<br>· Preparation and service of varieties of coffee types to meet various customer requirements |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Barista and other F&B personnel trained in espresso coffee making | D1.HPA.CL4.01 |

# FBS2.5. UNIT TITLE: MAKE ESPRESSO COFFEE

## UNIT DESCRIPTOR

This unit covers the competencies required to extract and prepare espresso coffee in a variety of hospitality settings using a commercial espresso machine.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Select and grind coffee**

P1. Select coffee and grind to correct particle size, according to requirements and customer preferences

P2. Take into consideration any environmental and equipment factors affecting dosage, and adjust grind and dose accordingly

**E2. Extract coffee**

P3. Select appropriate cups or glassware and ensure they are warm before preparation

P4. Measure or dispense required amount and place into clean filter basket, tamping coffee evenly using correct pressure

P5. Ensure group head is clean prior to inserting group handle

P6. Monitor water and pump pressure, and moderate between cycles, according to procedures

P7. Analyse extraction rate and adjust where appropriate

P8. Assess quality of extraction visually and where appropriate by verifying flavour

P9. Check spent grounds (puck or cake) to identify any required adjustments to dosage and technique

P10. Release or purge water for two seconds from the group head before placement of group handle to extract coffee

**E3. Texture milk**

P11. Select correct cold milk and appropriate clean, cold jug according to espresso requirements and quantity on order

P12. Expel excess water from steam wand before and after texturising milk and wipe clean after use

P13. Texture milk according to milk type and specific order requirements

P14. Combine foam and milk through rolling, ensuring even consistency

P15. Pour milk promptly, evenly and consistently, according to coffee style and customer preferences

### KNOWLEDGE REQUIREMENTS

K1. Describe the key principles of coffee making

K2. State the appropriate pour rate for espresso coffee (industry recommended rate is 30 ml in 27-32 seconds depending on type of espresso coffee ordered, customer preferences and the coffee blend)

K3. Describe the factors that affect quality of coffee

K4. Describe the types of grind and grinding equipment

K5. Explain the impacts on flavour of coffee beverages from:
- Cleanliness of machines
- Water temperature and pressure

K6. Describe the storage conditions and requirements for coffee and commodities

K7. Review the cleaning and maintenance procedures

K8. Identify symptoms of potential faults in espresso machines and grinders

K9. List the sequencing and production of orders.

K10. State the organisational and industry standards for:
- Serviceware used for espresso coffee beverage presentation
- Accompaniments used to enhance beverages
- Presentation of beverages including latte art

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Coffee styles to be prepared must include:**
- Short black (espresso)
- Long black
- Cappuccino
- Flat white
- Caffe latte
- Short and long macchiato
- Mocha
- Vietnamese style coffee, Saigon style coffee
- Irish coffee or other coffee made with liqueurs

**2. Factors to consider in grinding coffee include:**
- Pre-setting grinder
- Sensory analysis of grind, including:
  - Visual
  - Tactile
  - Olfactory
- Tasting of finished product.

**3. End of service activities include:**
- Removing beans from hoppers at the end of service day or shift
- Storing according to enterprise requirements.

**4. Monitor and assess the espresso machine and grinder may include:**
- Ensuring the dosing chamber delivers the correct dosage of coffee
- Checking steam and pump pressure
- Stripping the grinder of external working parts, observing required safety procedures according to enterprise requirements

## ASSESSMENT GUIDE

**Evidence of the following is essential:**
- Ability to recognise quality in espresso coffee, meet customer requirements and expectations, and identify factors affecting quality and required outcomes
- Ability to address problems during preparation and service of espresso coffee
- Ability to extract and present quality coffee within realistic timelines
- Compliance with all workplace hygiene and food safety regulations
- Safe work practices in making espresso coffee.

**Evidence of the following is required:**
1. Four occasions of selecting coffee and grinding to correct particle size, according to requirements and customer preferences
2. Four occasions of tamping and extracting coffee to the correct amount and pressure to ensure a quality coffee
3. Four occasions of texturing milk according to milk type and specific order requirements and combining foam and milk through rolling, ensuring even consistency

## ASSESSMENT METHODS

**A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate:**
- Direct observation of practical demonstration of extracting and serving coffee over an entire service period
- Tasting of coffee prepared by the candidate
- Use of video or peer observation
- Written or oral questions to assess required knowledge relating to preparing and serving espresso coffee
- Review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Final outcome should be an espresso coffee that meets all requirements and customer preferences<br><br>**Assessment must ensure:**<br>• Access to a workstation with industry-current commercial espresso machine and appropriate equipment, including:<br> • Thermometer<br> • Coffee grinders or mills<br> • Serviceware, including cups, saucers, glasses, mugs and flatware<br> • Weighing and measuring equipment<br> • Storage bins in appropriate sizes and materials<br> • Blind or blank filters<br> • Tampers<br> • Espresso cleaning detergent<br> • Bins for discarded pucks or grind tubes<br>• Access to a range of coffee types and commodities<br>• Preparation of quantities of coffee items within industry-realistic timeframes for multiple customers simultaneously<br>• Preparation and service of varieties of coffee types to meet various customer requirements. | |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Barista and other F&B personnel trained in espresso coffee making | D1.HPA.CL4.01 |

## FBS2.6. UNIT TITLE: SERVE AND PRESENT ESPRESSO COFFEE

### UNIT DESCRIPTOR

This unit covers the competencies required to serve espresso coffee in a variety of hospitality setting using a commercial espresso machine, including storage of coffee and cleaning, and care and preventative maintenance of machinery.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.   Present and serve espresso coffee**

P1.   Present coffee attractively using clean ceramic or glass cups and avoiding drips and spills

P2.   Serve coffee at the required temperature, according to customer requirements and style, with appropriate cream, milk froth and accompaniments

**E2.   Clean and maintain espresso machine**

P3.   Follow required health and safety requirements throughout all cleaning and maintenance procedures

P4.   Clean all machine and parts thoroughly and safely according to manufacturer specifications, using appropriate cleaning methods and recommended cleaning products and materials

P5.   Monitor and assess the operation and efficiency of the espresso machine and grinder during usage and take appropriate action where required in relation to defects and faults

P6.   Identify situations requiring the attendance of a trained service technician, licensed electrician or a designated senior person within the enterprise

P7.   Use energy and water resources efficiently when preparing coffee and cleaning equipment to reduce negative environmental impacts

### KNOWLEDGE REQUIREMENTS

K1.   Describe how to present coffee attractively using appropriate styles

K2.   Describe the factors in serving coffee according to customer requirements and style

K3.   Identify the serviceware used for espresso coffee beverage presentation

K4.   List the type of accompaniments used to enhance beverages

K5.   Describe the process of presentation of beverages including latte art

K6.   Explain the required storage of coffee beans, ground coffee, milk and other ingredients:
  • Correct environmental conditions to ensure food safety
  • Appropriate methods to optimise shelf life

K7.   Describe the methods to ensure efficient use of ingredients and to minimise wastage

K8.   Describe the equipment used to prepare espresso coffee beverages including the technical features and functions of different espresso machines and grinders

K9.   Describe the correct cleaning and maintenance procedures for espresso coffee machines and grinders

K10.  List the routine problems and faults in espresso machines and grinders

K11.  State the work practices for the management of large coffee beverage orders

K12.  Explain the cost and profit issues associated with the provision of espresso coffee service, including product, equipment, accessories and pricing of menu items

**CONDITIONS OF PERFORMANCE AND VARIABLES**

**1. Presenting coffee includes:**
- Using clean ceramic
- Using glass cups
- Avoiding drips and spills
- Serving coffee at the required temperature
- Serving coffee according to customer requirements and style
- Serving coffee with appropriate cream, milk froth and accompaniments.

**2. Cleaning procedures include:**
- Wiping down entire machine to ensure cleanliness
- Purging reservoir of hot water, releasing steam and backwashing the machine with an appropriate cleaning solution
- Pouring boiling water to clean drainage pipes
- Backflushing the machine at the end of a service cycle, using clean water to ensure no chemical and other residues are left
- Cleaning the bean hopper using wet method, and drying thoroughly before refilling and storing
- Brushing out dispensers
- Cleaning all remaining parts using dry cleaning method
- Backflushing group heads according to recommended industry methods, using a blank filter and appropriate machine detergent
- Using colour-coded cloths, such as using blue for general cleaning and yellow for cleaning and wrapping steam wands
- Wiping steamer wands after each use, using a damp cloth
- Where there is build-up or caked-on product, wrapping steamer wands in a clean cloth, opening the valve and allowing hot water, with steam venting, to soften caked-on milk and then wiping with a damp cloth
- Washing drip trays
- Removing shower screens and diffusers if appropriate, cleaning using wet method and reassembling
- Cleaning around the inside of the group head using an appropriate brush or cloth
- Cleaning group handle and filter basket and steam arm spout after removing, using the wet method
- Using correct and environmentally sound disposal methods for coffee making waste including recyclable glass and plastic bottles and containers.

**3. Cleaning methods must include using a range of techniques, including:**
- Wet techniques: using warm water with recommended detergent for soaking various parts and cleaning with sponge, damp cloth or scourer (only for group handle)
- Dry techniques: using a damp cloth followed by a dry cloth.

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br><br>1. Present and serve espresso coffee on at least four occasions attractively using clean ceramic or glass cups, avoiding drips and spills, served at the required temperature, according to customer requirements and style, with appropriate cream, milk froth and accompaniments.<br>2. Clean and maintain espresso machine efficiently on at least four occasions following required health and safety requirements throughout all cleaning and maintenance procedures. | This unit may be assessed on or off the job. Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge.<br><br>Assessment must relate to the individual's work area or area of responsibility.<br><br>**The following methods may be used to assess competency for this unit:**<br>· Observation of practical performance<br>· Practical exercises that reflect the workplace use of the facilities & equipment<br>· Recorded oral test and/or written questions<br>· Third party reports completed by a supervisor<br>· Project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Wine Waiter, Captain, Restaurant Supervisor, General Waiter | D1.HPA.CL4.01 |

# FBS3.1. UNIT TITLE: MONITOR FOOD AND BEVERAGE SERVICE

## UNIT DESCRIPTOR

This unit covers the competencies required to monitor, maintain and improve Food & Beverage Service.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Monitor, maintain and improve Food & Beverage Service**

P1.  Monitor service levels on an on-going basis through close contact with day to day operations

P2.  Identify customer or quality issues promptly and make appropriate adjustments accordingly

P3.  Adjust procedures and systems in consultation with colleagues to improve service quality

P4.  Consult colleagues about ways to improve service levels

**E2.  Plan and organise workflow**

P5.  Schedule work to enhance efficiency and customer service quality

P6.  Delegate work to appropriate people, and empower them to do their work effectively

P7.  Assess progress against agreed objectives and timelines

P8.  Assist colleagues in prioritization of workload through supportive feedback and coaching

**E3.  Solve problems and make decisions**

P9.  Identify and analyse food and beverage service problems from an operational and customer service perspective

P10.  Initiate corrective action to resolve the immediate problem where appropriate

P11.  Encourage team members to raise problems and encourage the individual's participation in solving the problem

P12.  Monitor the effectiveness of solutions in Food & Beverage Service

P13.  Follow hotel policies and guidelines for handling problems and decision-making

### KNOWLEDGE REQUIREMENTS

K1.  Describe the key concepts of quality assurance and how this is managed and implemented in your establishment

K2.  Explain how you ensure service levels are maintained on an on-going basis

K3.  Describe how customer or quality issues are identified and handled

K4.  Describe the quality procedures and systems in place in your establishment

K5.  Explain how you apply time management principles to your daily work and responsibilities

K6.  Explain the systems for work scheduling and delegation of work

K7.  Describe how you support colleagues in helping them prioritize their workload

K8.  Give examples of operational and customer service problems you have handled and resolved

K9.  Describe the procedures for taking corrective action to resolve operational problems

K10.  Explain how you encourage team members to raise problems and participate in solving the problem

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Efficiency and service levels may relate to:**
- Monitoring and measuring performance
- Monitoring customer service satisfaction
- Monitoring costs

**2. Quality assurance initiatives may include:**
- Quality systems
- Quality standards

**3. Quality problems may include:**
- Difficult customer service situations
- Equipment breakdown/technical failure
- Failure to deliver promised service to customers
- Poor rosters giving rise to inadequate/inappropriate staffing levels
- Delays and time difficulties
- Staff poor attitude/poor behaviour
- Lack of management support/control
- Lack of ownership

**4. Procedures and systems may be related to:**
- Service quality
- Emergencies
- Food safety and hygiene
- Security
- Safe work practices
- Record keeping

**5. Schedule work may relate to:**
- Meal breaks
- Shift allocations
- Holidays and leave
- Staff rosters

**6. Principles of delegation may relate to:**
- Defining employee's responsibility
- Communicating authority
- Clarifying expected results

**7. Supportive feedback and coaching may relate to:**
- Informal and formal feedback
- Performance review
- Advice/guidelines
- Principle applications

**8. Workplace problems may relate to:**
- Guests
- Suppliers
- Equipment
- Administrative
- Organisational
- Employee
- Weather
- Natural events

**9. Corrective action may include:**
- New procedures and/or processes
- Changes to job descriptions or contracts
- Changes to workplace procedures and/or processes

**Important behaviours for supervisors/managers include:**
1. Present information clearly, concisely, accurately and in ways that promote understanding
2. Give feedback to others to help them maintain and improve their performance
3. Continuously improve products and services
4. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
5. Monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
6. Develop systems to gather and manage information and knowledge effectively, efficiently and ethically
7. Use a range of legitimate strategies and tactics to influence people
8. Make effective use of available resources
9. Recognise stakeholders' needs and interests and manage these effectively
10. Specify the assumptions made and risks involved in understanding a situation

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Assessment should include practical demonstration of the ability to manage workplace operations either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge<br><br>Assessment must relate to the individual's work area, job role and area of responsibility<br><br>Assessment must include project or work activities that allow the individual to respond to multiple and varying workplace issues relevant to work area, job role and area of responsibility that allow them to demonstrate knowledge and awareness of the principles of monitoring workplace operations and how to manage such issues.<br><br>**Assessment must include:**<br>1. Two documented examples/cases of how you monitored and identified customer or quality issues and adjusted procedures and systems in consultation with colleagues to improve F&B service quality<br>2. Two documented examples of how you scheduled work to enhance efficiency and customer service quality, and ensured that work was delegated to appropriate people in accordance with principles of delegation<br>3. Two documented examples of where you assisted colleagues in prioritization of workload through supportive feedback and coaching<br>4. Two documented examples/cases of how you identified and analysed food and beverage service problems and initiated corrective action to resolve the problem | **This unit may be assessed on or off the job. Suitable assessment methods may include:**<br>· Case studies<br>· Observation of practical candidate performance<br>· Oral and written questions<br>· Portfolio evidence<br>· Problem solving<br>· Third party reports completed by a supervisor<br>· Project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Team Leader, Restaurant Manager, F&B Manager | D1.HRM.CL9.03 |

# FBS3.2. UNIT TITLE: PROVIDE SPECIALIST ADVICE ON WINE

## UNIT DESCRIPTOR

This unit describes the competencies required to provide specialised advice on wines to customers in a hotel, restaurant or other food and beverage outlet.

## ELEMENTS AND PERFORMANCE CRITERIA

**E1. Evaluate wines**

P1. Identify and explore the characteristics of a range of wines using the full range of sensory evaluation techniques

P2. Review other information about viticulture and specific imported wine styles, regions and production methods to complement the sensory evaluation process

P3. Develop informed opinions about wine that support work as a specialist in wine

**E2. Handle, store and monitor wine products**

P4. Store wine according to particular requirements of different wines

P5. Monitor wine quality and recognise impaired quality based on in depth knowledge of wines

P6. Where required, serve wine appropriately and at the correct temperature according to type and style of wine and customer preference

P7. Decant wines using techniques appropriate to the variety, style and vintage of wine

**E3. Advise customers on wines**

P8. Provide accurate information and assistance about different wine options

P9. Recommend wine and food pairing options for customers

P10. Discuss and debate wine characteristics, origins and production methods with customers, taking account of the customer's level of wine knowledge

P11. Take account of appropriate and ethical business considerations when providing advice and make adjustments accordingly

P12. Assist customers with wine selections according to taste, price preferences and other specific needs

P13. Resolve issues with wine quality through accurate identification of faults and appropriate corrective action

**E4. Extend and update own knowledge on wines**

P14. Conduct formal and informal research to access current, accurate and relevant information about wines

P15. Identify trends in customer tastes based on direct contact and workplace experience

P16. Identify general trends in the wine market and apply to the workplace as appropriate

P17. Provide assistance in the design, content and pricing of international wine list as required

## KNOWLEDGE REQUIREMENTS

K1. Explain the full range of sensory evaluation techniques and their relevance to different types of wines

K2. Describe the structure, history, trends and philosophies of:
  • The international wine industry
  • The major international wine producing nations
  • General understanding of the operation of wine shows and wine medal systems in an international context

K3. Discuss the characteristics of major international wines, including:
  • Different wine types and their styles
  • Different production methods
  • Label terminology and interpretation
  • Major regional variations
  • Principal grape varieties used in wine types
  • Major European wine laws
  • General knowledge of relevant geography in relation to its impact on wine growing
  • Impact of the vineyard and viticultural techniques affecting the taste and style of wine
  • Annual cycle of a general vineyard and regional specific cycles

## KNOWLEDGE REQUIREMENTS

K4. Describe the wine production methods and variations for white, red, sparkling and fortified wines, including:
- Basic wine production steps and variations for different wines (harvesting, crushing, pressing, fermentation, clarification, maturing, bottling)
- Old world approaches to wine making and attitudes to new world wine making
- Specific production techniques for white wine (additional clarification process - before and after fermentation, pressing, malolactic fermentation and oak usage)
- Specific production techniques for red wine (fermentation on the skins, maceration techniques such as pumping over, plunging down, heading down and rotary fermenters
- Specific production techniques for sparkling wines such as traditionelle, the transfer process, tank fermentation and carbonation
- Specific production techniques for fortified wines

K5. Appraise the factors that affect the style and quality of wine, including:
- Climate
- Soil
- Grape variety
- Viticultural techniques
- Storage
- Vinification techniques
- Key structural components in wine and their impact on taste , including alcohol, tannin, sugar, fruit flavour

K6. Identify the indicators of quality in wines and analysis and diagnosis of wine faults or impairments, including:
- Oxidation
- Tartrates
- Cloudiness
- Cork faults
- Presence of hydrogen sulphide

K7. Describe the wine service techniques, including serving aged wines and processes for the decanting of wine

K8. Discuss the storage and cellaring requirements for a range of wines and reasons for these contributing factors of a successful wine list

K9. Provide an overview of the types of foods that match successfully with different wines

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Varieties of wines can include wines from:**
- Europe - France, Italy, Germany, Greece, Spain, Portugal, Central and South Western Europe
- North and South America (USA, Chile, Argentina etc)
- New Zealand & Australia
- South Africa
- Emerging wine growing countries such as Vietnam, Hungary, Romania & Morocco

**2. Sensory evaluation techniques should include:**
- Visual appraisal:
  - Wine swirling and glass handling
  - Use of light and background
  - Intensity and type of colour
  - Clarity
  - Identifying 'legs' or 'tears' to assess alcohol /glycerol content
- Smell or nose appraisal:
  - Techniques for releasing aroma and bouquet
  - Recognising 'off' odours
  - Assessing intensity of aromas
  - Describing smell characteristics (eg fruity, vegetal, spicy)
  - Assessing age
- Taste appraisal:
  - Techniques for releasing wine flavours (sucking in air, swirling wine over taste buds)
  - Spitting techniques
  - Recognising acidity, sweetness, weight or body, length, wine faults
  - Assessing balance of wine features on the palate

**3. Other information may include:**
- Promotional information
- Details of production methods
- Reference texts on wines
- Product reviews
- Presentation sessions from growers, wholesalers, distributors, visiting winemakers

**4. Work as a specialist in wine might involve:**
- Making presentations on wine
- Selling wine to corporations
- Selling wine to individuals
- Conducting specialised wine tastings
- Developing wine list suggestions
- Providing winery tours

**5. Particular requirements may relate to:**
- Temperature
- Humidity
- Stock rotation
- Shelf life
- Amount of UV light
- Vibrations

**6. Impaired quality might relate to:**
- Oxidation
- Tartrates
- Cloudiness
- Cork faults
- Presence of hydrogen sulphide

**7. Appropriate and ethical business considerations may include:**
- Profitability requirements
- Current stock
- Supplier arrangements
- Stock availability
- Range being promoted

**8. Formal and informal research may include:**
- Talking to product suppliers, winemakers and vineyard managers
- Memberships of associations and industry bodies
- Reading general and trade media and supplier information
- Attending trade shows
- Attending wine tastings
- Reading wine reference books
- Using the internet

## ASSESSMENT GUIDE

**Evidence of the following is required:**

1. Identification of wine characteristics, style, country and region of origin, vintage and production method using sensory evaluation techniques for at least six red or white wines from at least 3 regions
2. At least three occasions of effective communication of wine advice to customers recorded
3. Demonstrated detailed knowledge of international wines as specified under knowledge assessment
4. Demonstrated ability to maintain and extend current and relevant knowledge of wines and to apply that knowledge to different workplace activities (portfolio evidence).

**Assessment must ensure:**

- Interaction with and involvement of other people to discuss wine characteristics and options and to answer varied questions about wines
- Access to a wide range of wines and to information on wines.

## ASSESSMENT METHODS

**A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:**

- Direct observation of candidate providing advice to customers or colleagues on wine
- Oral or written questions to assess knowledge of wine
- Observation of a presentation on wine
- Observation of candidate evaluating wines and providing opinions
- Research project to develop information about wines for use in particular workplace context
- Review of wine lists written by the candidate for particular contexts and purposes
- Review of portfolio of evidence and third-party workplace reports of on-the-job performance by the candidate.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Wine Attendant, Sommelier, Restaurant Supervisor | N/A |

# FBS3.3. UNIT TITLE: PLAN AND MONITOR QUALITY OF ESPRESSO COFFEE

## UNIT DESCRIPTOR

This unit describes the competencies required to plan and monitor the quality of espresso coffee served in restaurants, specialist coffee shops and other food and beverage outlets where espresso coffee is brewed and served.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Plan coffee beverage service**

P1. Develop coffee beverage menus taking into consideration profit requirements, market focus, demographics and customer preferences

P2. Select suppliers and roasters, and make purchases according to budget and quality

P3. Liaise with suppliers and roasters to ensure coffee service meets organisational quality standards

**E2. Monitor quality of coffee beverages**

P4. Identify desirable characteristics of superior espresso coffee beverages

P5. Evaluate coffee beans to ensure freshness

P6. Monitor grind to ensure quality and consistency of espresso extraction

P7. Monitor environmental variations affecting dose, and adjust the grind and dose accordingly

P8. Evaluate espresso coffee beverage quality and diagnose faults and problems in quality of coffee beans, ground coffee and coffee beverages

P9. Monitor coffee extractions and service ensuring quality and consistency

P10. Assess texture and temperature of milk served

P11. Seek and follow up feedback on coffee beverage quality from customers and staff

P12. Ensure ingredients and accompaniments are stored appropriately in suitable containers and conditions

P13. Ensure coffee beverages are presented correctly and attractively with suitable accompaniments

**E3. Monitor and maintain equipment**

P14. Monitor espresso coffee machine and other equipment for efficiency and reliability of operation

P15. Monitor temperature and water pressure

P16. Develop environmentally sound cleaning, maintenance, waste disposal and recycling practices

P17. Identify need for new equipment and serviceware taking into account relevant considerations and evaluate options

P18. Identify situations requiring use of specialist service technicians

P19. Schedule service calls and replacement of worn parts at appropriate times

### KNOWLEDGE REQUIREMENTS

K1. Describe how you ensure hygienic and safe work practices related to making, serving and storing coffee and coffee products and service equipment

K2. Describe your current work practices for the management of large coffee orders

K3. Explain the processes you use for diagnosis of problems and faults in coffee

K4. Describe the methods you use to ensure efficient use of product and to minimise wastage

K5. Describe how you liaise with other team members, clarify requirements, provide information and listen to and interpret information and non-verbal communication

K6. Explain how you calculate required quantities for ordering supplies and costs

K7. Appraise the cost and profit issues associated with the provision of espresso coffee service, including product, equipment and pricing of menu items

## KNOWLEDGE REQUIREMENTS

K8.    Explain how you diagnose and rectify problems and faults in coffee machines and equipment

K9.    Describe the impacts on flavour of coffee of machines, cleanliness of machines, temperature and pressure

K10.    List the regulatory and legislative requirements impacting on coffee and coffee service.

K11.    Describe the impacts on flavour of coffee beverages from cleanliness of machines and water temperature and pressure

K12.    List the organisational and industry standards for:
   · Serviceware used for espresso coffee beverage presentation
   · Accompaniments used to enhance beverages
   · Presentation of beverages including latte art

K13.    Describe the storage of coffee beans, ground coffee, milk and other ingredients:
   · Correct environmental conditions to ensure food safety
   · Appropriate methods to optimise shelf life
   · Methods to ensure efficient use of ingredients and to minimise wastage

K14.    Describe the technical features and functions of different espresso machines and grinders

K15.    Describe the cleaning and maintenance procedures for espresso coffee machines and grinders

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Knowledge may be sourced from:**
   · Associations and industry bodies
   · Coffee beverage tastings
   · Coffee reference books
   · General and trade media, and supplier information
   · Product suppliers, roasters and other baristas
   · The Internet
   · Trade shows.

**2.  To evaluate may involve use of:**
   · Customer feedback
   · Information or data on:
      · Repeat business
      · Sales of particular items, types of coffee beverages
      · Organisational and industry standards
      · Staff feedback
   · Sensory analysis, including:
      · Olfactory
      · Tactile
      · Tasting coffee beverage
      · Visual.

**3.  To monitor may involve:**
   · Identifying and diagnosing faults
   · Fine tuning or arranging fine tuning of machines and grinders according to manufacturer instructions and warranty requirements
   · Removing shower screens and diffusers if appropriate
   · Cleaning using wet method and reassembling.

**4.  Equipment may include:**
   · Bins for used coffee grounds
   · Blind or blank filter
   · Cleaning brushes
   · Coffee grinders
   · Colour coded cleaning cloths
   · Espresso coffee machines and parts
   · Flat edge implement such as a spatula for levelling off dosed filter basket
   · Measuring equipment:
      · Stopwatch or timer
      · Thermometer
   · Milk foaming jugs
   · Napkins
   · Powder shakers e.g. chocolate, cinnamon
   · Service trays
   · Spoons
   · Stirrers
   · Storage bins
   · Straws
   · Take-away cardboard trays
   · Tamp mats
   · Tampers

## CONDITIONS OF PERFORMANCE AND VARIABLES

**5. Serviceware may include:**
- Cups
- Saucers
- Mugs
- Glasses
- Take away coffee cups

**6. Considerations include:**
- Cost
- Reliability
- Reputation of supplier
- Service availability
- Size and capacity to meet outlet service needs
- Technical characteristics
- Training in operation

## ASSESSMENT GUIDE

**Assessment evidence must include:**

1. Two case studies/examples on how you evaluated coffee beans, ground coffee and coffee beverages, and diagnosed and rectified a range of faults
2. Two documented examples/cases on how you coordinated and improved the operational aspects of espresso coffee preparation for an coffee outlet
3. Two documented examples/cases on how you monitor and control the overall quality of espresso coffee beverages by maintaining commercial grade espresso coffee machines and grinders and by reviewing routine problems and faults in espresso machines and grinders.
4. Two examples of:
   - Maintenance schedules for espresso machines
   - Descriptive coffee beverage menus
   - Information sheets for use of customers and staff

**Assessment must ensure use of:**
- An operational food and beverage outlet with the fixtures, large and small equipment specific equipment for preparing espresso coffee beverages; this may be a:
  - Real industry workplace
  - Simulated industry environment such as a training food and beverage outlet servicing customers
  - A workstation with industry current commercial grade espresso machine and coffee grinders

## ASSESSMENT METHODS

**A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:**

- Use of case studies and problem-solving exercises to assess the individual's ability to evaluate coffee beans, ground coffee and coffee beverages, and diagnose and rectify a range of faults
- Review of workplace documents developed by the individual:
- Written or oral questioning to assess knowledge of:
  - History and culture of coffee beverages
  - Current and emerging espresso coffee service trends
  - Cost and profit issues associated with the provision of espresso coffee service
  - Major types of espresso coffee beverages, coffee beans and their characteristics
  - Technical features and functions of different espresso machines and grinders
  - Routine problems and faults in espresso machines and grinders
- Review of portfolio of evidence and third-party workplace reports of on-the-job performance by the individual.

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| · A commercial range of coffee beans, ground coffee, other ingredients and accompaniments<br>· Commercial beverage menus and standard recipes for coffee beverages currently used by the hospitality industry<br>· Organisational and industry standards for presenting for espresso coffee beverages<br>· Cleaning and maintenance procedures for espresso coffee machines and grinders | |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Barista, Head Barista, F&B Manager or Restaurant Supervisor | D1.HPA.CL4.01 |

# HRS3. UNIT TITLE: CONDUCT A STAFF PERFORMANCE REVIEW

## UNIT DESCRIPTOR

This unit covers the competencies required to monitor staff performance within the framework of established performance management systems. It requires the ability to monitor the day-to-day effectiveness of staff and to conduct structured performance reviews and formal counselling sessions.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Monitor staff performance**

P1.  Consult with and inform staff about expected standards of performance using appropriate communication mechanisms

P2.  Monitor on-going performance by maintaining close contact with the workplace and staff members

**E2.  Provide guidance, support & recognition**

P3.  Regularly provide confirming and corrective feedback to staff

P4.  Provide staff with guidance and support

P5.  Provide recognition and reward for achievements and outstanding performance

**E3.  Identify needs and provide solutions**

P6.  Identify the need for further coaching or training and organise according to organisational policies

P7.  Recognise and resolve performance problems

P8.  Identify and investigate performance problems

P9.  Use feedback and coaching to address performance problems

P10.  Discuss and agree upon possible solutions with the staff

**E4.  Conduct performance reviews**

P11.  Follow-up outcomes of informal counselling through review in the workplace

P12.  Organise and conduct a formal counselling session when needed according to required procedures

P13.  Conduct individual performance evaluations openly and fairly

P14.  Complete and file performance management records

P15.  Agree on courses of action with staff and follow up in the workplace

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### KNOWLEDGE REQUIREMENTS

K1.  Describe the role and importance of monitoring staff performance and providing feedback and coaching

K2.  Describe the performance review practices, including:
  • Reasons for performance review
  • The format for and inclusions of performance review documents

K3.  Describe the methods of reviewing performance in your organisation

K4.  Explain the procedures for performance review interviews

K5.  Explain the procedures for formal counselling sessions

K6.  Explain grievance procedures

## CONDITIONS OF PERFORMANCE AND VARIABLES

The variables relate to the unit of competency as a whole. It allows for different work environments and situations that may affect performance.

1. **Expected standards of performance and performance problems may relate to:**
   - Adherence to procedures
   - Cost minimisation
   - Customer service standards
   - Level of accuracy in work
   - Personal presentation
   - Productivity
   - Punctuality
   - Response times
   - Team interaction
   - Waste minimisation
   - Attitude and behaviours
   - Responsibility
   - Liability
   - Others

2. **Guidance and support may include:**
   - Advice on training and development opportunities
   - Confirmation of organisational objectives and key performance requirements
   - Ensuring adequate resources are applied
   - Opportunity to discuss work challenges
   - Representing staff interests in other forums
   - Support with difficult interpersonal situations

3. **Recognition and reward may include:**
   - Acknowledgment of individual good performance to the whole team
   - Informal acknowledgment
   - Presentation of awards
   - Written reports to management

4. **Possible solutions to performance may include:**
   - Additional training and coaching
   - Adjustment of workload
   - Agreement on short term goals for improvement
   - Assistance with problems outside of the workplace
   - Reorganisation of work practices

5. **Required procedures for a formal counselling session may include:**
   - Preparation:
     - Formal notification to staff member and management
     - Invited participation of appropriate people
     - Organisation of appropriate location for counselling session
   - Conducting the performance review:
     - Start and introduce the objectives
     - Discussions on achievements, improvement requirement
     - Set goals
     - Conclusions made
   - Complete documentation

6. **Performance management systems may include:**
   - Methods of collecting performance data
   - Methods of interpreting performance data
   - Processes for performance appraisal interviews

**Important behaviours for supervisors/ managers include:**

1. Communication skills to provide effective feedback, coaching and counselling to team members
2. Critical thinking skills to evaluate the reasons contributing to poor staff performance
3. Initiative and enterprise skills to proactively provide colleagues with appropriate guidance and support to enhance their work performance
4. Literacy skills to:
   a. Read and interpret staff records and performance management documents
   b. Write potentially complex and sensitive information about staff performance
5. Planning and organising skills to coordinate regular performance appraisals and coordinate and operate formal counselling sessions
6. Problem-solving skills to identify and respond to staff performance issues
7. Self-management skills to take responsibility for monitoring staff performance
8. Teamwork skills to monitor the performance of individuals, their effect on the team and take corrective action to enhance the whole of team performance

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc. This unit may be assessed holistically by means of a portfolio of evidence or report on aspects of managing performance in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.<br><br>**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**<br>1. Two documented examples or cases when the manager monitored staff performance and provided guidance, support and recognition and reward for achievements and outstanding performance<br>2. Two documented examples or cases when the manager identified needs and provided solutions to individuals in their team<br>3. One documented example of a successfully conducted performance review<br>4. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions | **Suitable methods will include:**<br>• Portfolio of workplace evidence to include notes of meetings, notes of discussion with individuals and colleagues, details of support and advice provided to individuals, record of performance review meetings etc (without named individuals)<br>• Personal statements<br>• Witness testimony<br>• Professional discussion<br><br>Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.<br><br>A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met. |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HHR.CL8.01-04 |

# HRS7. UNIT TITLE: PROVIDE ON-THE-JOB COACHING

## UNIT DESCRIPTOR

This unit covers the competencies required to helping individuals – either in your own team or from another work group – to develop and maintain their performance through coaching.

Coaching involves helping individuals improve their performance by:

- Identifying their strengths and how they can use these most effectively
- Analysing areas of their work where they are less than fully effective and developing a coaching plan to address weaknesses and gaps
- Coaching individuals in technical, practical skills, customer service, interpersonal/communication skills or other areas of the business operation

This standard is relevant to supervisors and managers who have a specific responsibility for coaching individuals.

## ELEMENTS AND PERFORMANCE CRITERIA

### E1. Identify coaching requirements

P1. Work with individuals to identify and prioritise their needs for coaching

P2. Ensure that individuals' coaching requirements are in line with your organisation's objectives

P3. Establish with individuals what they expect from the coaching

P4. Confirm with individuals what coaching that will be provided

P5. Explore with individuals the knowledge and skills they need to develop, and the behaviours they need to change, in order to meet the desired standard of performance

P6. Explore with individuals obstacles which could hinder their progress and how to remove these obstacles

### E2. Prepare and deliver the coaching sessions

P7. Plan with individuals how they can develop new skills and behaviours in a logical step-by-step sequence

P8. Prepare the coaching sessions and confirm the content and desired outcomes

P9. Deliver technical, practical or other coaching sessions to help individual develop new skills and behaviours or enhance existing skills and behaviours

### E3. Monitor progress & provide feedback

P10. Monitor the individuals' progress in a systematic way

P11. Provide specific feedback designed to improve individuals' skills, reinforce effective behaviours and enhance their motivation to achieve the desired standard of performance

P12. Agree with individuals when they have achieved the desired standard of performance, or when they no longer require coaching

P13. Encourage and empower individuals to take responsibility for their continuing professional development

## KNOWLEDGE REQUIREMENTS

K1. Describe relevant coaching models, tools and techniques, and how to apply these

K2. Define the skills effective coaches require, and how to apply these skills

K3. Review how to establish a coaching contract with individuals and what the contract should cover

K4. Describe how to help individuals identify the skills they need to develop and the behaviours they need to change

K5. Explain how to help individuals identify and remove obstacles that could hinder their progress

K6. Explain how to help individuals prepare a plan to develop their skills and/or adapt their behaviours

K7. Describe how to help individuals try out new skills and behaviours and how to reflect on their progress

K8. Explain the importance of monitoring individuals' progress in developing new skills and behaviours and how to do this

K9. Discuss how to give individuals specific feedback designed to improve their skills, reinforce effective behaviours and enhance their motivation

## KNOWLEDGE REQUIREMENTS

K10. Explain how to empower individuals to take responsibility for their own development

K11. Review industry requirements for supporting individuals to improve their performance

K12. Identify sources of information, resources and advice in your organisation

K13. Describe your organisation's policies and practices in relation to on-the-job coaching

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **Identifying coaching requirements includes:**
   - Establishing the specific area(s) in which they want to develop their performance
   - Establishing their current standard of performance
   - Establishing the standard of performance they wish to achieve
   - Establishing why they want to develop their performance
   - Clarifying the support they can expect from you, and the commitment you expect from them
   - Confirming the coaching you will provide
   - Confirming the timescale
   - Confirming the location, frequency and duration of coaching sessions
   - Confirming points at which progress will be reviewed
   - Confirming how progress will be measured and assessed

2. **Obstacles which could hinder staff progress could include:**
   - Work pressures
   - Shift patterns
   - Resistance to change
   - Lack of facilities, equipment or resources
   - Lack of support from colleagues or others
   - Lack of proper training

3. **Skill deficiencies that could be addressed by coaching should include:**
   - Skills which do not require formal or extended training sessions for example:
     - Customer service or interpersonal/communication skills
     - Technical or practical skills such as operating equipment
     - Selling or promoting products and servicing

4. **Suitable time and place may include:**
   - On-the-job during work hours
   - Before or after work
   - In a simulated location away from the actual workplace

5. **Specific job skills may relate to:**
   - Skills required to support introduction of new equipment
   - Skills required to support introduction of new processes
   - Skills required to support introduction of new procedures
   - Skills required to complete a job or task effectively and efficiently

**Important behaviours of coaches (supervisors/managers) include:**

1. Seek opportunities to improve performance
2. Find practical ways to overcome obstacles
3. Listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
4. Show empathy with others' needs, feelings and motivations and take an active interest in their concerns
5. Support others to make effective use of their abilities
6. Give feedback to others to help them maintain and improve their performance
7. Recognise the achievements and success of others
8. Inspire others with the desire to learn
9. Address performance issues promptly and resolve them directly with the people involved
10. Check individuals' commitment to their roles and responsibilities
11. Communicate clearly the value and benefits of a proposed course of action
12. Model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc. This unit may be assessed holistically by means of a portfolio of evidence or report on coaching activities for staff in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation. | **Suitable methods will include:**<br>· Portfolio of workplace evidence<br>· Personal statements<br>· Witness testimony<br>· Professional discussion<br><br>Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.<br><br>A portfolio or written report should be supplemented by oral questions to ensure all aspects of the Evidence requirements are fully met. |

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. Two examples of work records to show your work with individuals to identify and prioritise their needs for coaching and to confirm the coaching that will be provided, the skills or behaviours they need to change and any obstacles that might hinder their progress
2. Two examples or cases of the outlines or content of the coaching sessions and the delivery of the technical, practical or other coaching sessions to help individual develop new skills and behaviours or enhance existing skills and behaviours
3. Two examples or cases of the outcomes of coaching, the progress of individual staff and how they reached the desired standard of performance
4. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HHR.CL8.06 |

# HRS8. UNIT TITLE: DELIVER A GROUP TRAINING SESSION

## UNIT DESCRIPTOR

This unit covers the competencies required to devise and implement training for your team members, balancing the developmental needs of the individual with the skills and knowledge needed by them to fulfil their role within the organisation.

Within many hospitality organisations, particularly those that are small, there may be little human resources support, therefore as a team manager you may identify and/or provide relevant training for staff yourself.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Establish training and development requirements**
P1. Identify current competencies of trainees/staff
P2. Identify required competencies for trainees/staff
P3. Confirm the identified training gap with relevant personnel
P4. Determine support available for training provision

**E2. Prepare training**
P5. Plan training requirements
P6. Develop training content
P7. Develop training resources and materials

**E3. Facilitate training session**
P8. Prepare the training venue
P9. Introduce training and assessment activities
P10. Conduct training session
P11. Provide opportunities for trainees/staff to practice skills
P12. Provide feedback to trainees/staff

**E4. Evaluate and follow up training session**
P13. Complete evaluation with trainees/staff
P14. Ensure further training sessions incorporate feedback

### KNOWLEDGE REQUIREMENTS

K1. Explain how the training needs of individuals and teams fit in with the needs of the organisation
K2. Explain how to carry out training needs analysis
K3. Explain how to identify appropriate training, and what learning outcomes are achieved via different types of training

K4. Describe how to ensure training outcomes meet identified training needs
K5. Explain what sort of feedback is required from the individual on the training, and how to evaluate the effectiveness of the training
K6. Explain why it is important to look at long-term goals as well as the short-term benefits

## CONDITIONS OF PERFORMANCE AND VARIABLES

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance.

**1. Identify current competencies may be related to:**
- Observing workers' practices
- Reviewing data contained in workplace staff performance systems/databases
- Seeking input from managers, supervisors and co-workers
- Obtaining feedback from customers
- Checking currency of qualifications, certificates and licenses
- Identifying individual trainees/staff preferences for training delivery

**2. Identify required competencies may include:**
- Reviewing relevant training programs
- Verifying plans for the business
- Reviewing relevant policies and procedures
- Reviewing existing job analysis sheets
- Specifying product and service criteria
- Describing the workplace context, including the conditions under which tasks are to be completed

**3. Describe the training gap may include:**
- Specifying the difference between organisational expectations of staff/trainees' performance
- Actual level of workplace performance for each staff trainees
- Confirming identified training gaps with individual staff/trainees

**4. Support available for training provision may include:**
- Time
- Physical resources
- Human resources
- Financial resources
- Training venues
- Training resources and materials
- Management support for the initiative
- Established internal career paths based on internal training delivery

**5. Develop training content may include:**
- Ensuring accuracy and comprehensiveness of proposed content
- Identifying topics and sub-topics for training delivery
- Identifying the underpinning attitudes, skills and knowledge for each area of proposed content
- Mapping training content against identified competencies required by staff/trainees
- Emphasising workplace safety at all stages of training delivery and in all training content

**6. Develop training resources and materials may include:**
- Matching training resources and materials against identified workplace need
- Identifying specific materials and resources, including manuals, texts, work books, workshop guides, hand-outs, standard operating procedures, posters, videos, sample items etc
- Preparing establishment-specific training materials and resources to address identified workplace need

**7. Facilitate training session may include:**
- Adhering to the prepared training/delivery plan, including coverage of content/objectives, and implementation of activities
- Adjusting the prepared delivery plan to effectively accommodate issues arising during the training session
- Applying appropriate interpersonal skills to facilitate the training
- Using effective verbal communication skills to deliver training, provide supplementary information, and monitor the training session
- Using suitable types of training: job talk or job demonstration

**8. Provide feedback to staff/trainees may include:**
- Ensuring feedback is provided sensitively
- Using positive feedback to motivate and encourage staff/trainees
- Recognising effort and not just success
- Being sincere in the giving of feedback
- Being open as a trainer to feedback from staff/trainees
- Using verbal and non-verbal techniques to provide feedback

**9. Complete evaluation with learners could include:**
- Providing evaluation forms that ensure objective evaluation of training content, training delivery, training facilities and learning outcomes are met
- Ensuring further training sessions incorporate feedback from the training session

## CONDITIONS OF PERFORMANCE AND VARIABLES

**Important behaviours for supervisors/ managers include:**

1. Seek opportunities to improve performance
2. Find practical ways to overcome obstacles
3. Listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
4. Show empathy with others' needs, feelings and motivations and take an active interest in their concerns
5. Support others to make effective use of their abilities
6. Give feedback to others to help them maintain and improve their performance
7. Recognise the achievements and success of others
8. Inspire others with the desire to learn
9. Address performance issues promptly and resolve them directly with the people involved
10. Check individuals' commitment to their roles and responsibilities
11. Communicate clearly the value and benefits of a proposed course of action
12. Model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This Unit may be assessed holistically by means of a portfolio of evidence or report on a training session for staff in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. Two examples of training needs analysis that identifies the skills or behaviours required by staff in order to plan a training session
2. Two examples of the outlines, training plan and content of the training sessions which demonstrates how individuals developed new skills and behaviours or enhanced existing skills and behaviours
3. Two examples of the outcomes of the training session, the progress of individual staff and how they reached the desired standard of performance (based on evaluation of the training courses)
4. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

## ASSESSMENT METHODS

**Suitable methods will include:**

- Portfolio of workplace evidence
- Observation
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HHR.CL8.07-09 |

# HRS9. UNIT TITLE: QUALITY ASSURE WORK IN YOUR TEAM

## UNIT DESCRIPTOR

This unit covers the competencies required to check the progress and quality of the work of team members to ensure that the required standard of performance is being met.

This standard is relevant to managers, supervisors and team leaders who monitor progress of work in their team and check the quality of the output.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Monitor progress and quality of work**

P1. Check regularly the progress and quality of the work of team members against the standard performance expected

P2. Provide team members with prompt, specific feedback designed to maintain and improve their performance

**E2. Provide support to team members**

P3. Support team members in identifying and dealing with problems and unforeseen events

P4. Motivate team members to complete the work they have been allocated on time and to the standard required

P5. Provide any additional support and/or resources team members require to complete their work on time and to the standard required

**E3. Deal with any performance problems**

P6. Identify any unsatisfactory performance, discuss the causes and agree ways of improving performance with team members

P7. Recognise successful completion of significant pieces of work by team members

P8. Motivate team members to maintain and continuously improve their performance over time

P9. Use information collected on the performance of team members in any formal appraisal of performance, where appropriate

### KNOWLEDGE REQUIREMENTS

K1. Summarise the most effective ways of regularly and fairly checking the progress and quality of the work of team members

K2. Describe how to provide prompt and constructive feedback to team members

K3. Explain how to select and apply different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and continuously improve their performance

K4. Explain how to select and apply different methods for recognising team members' achievements

K5. Describe the additional support and/or resources which team members might require helping them complete their work on time and to the standard required and how to assist in providing this

K6. Explain how you review your team's plan for undertaking the required work

K7. Describe your organisation's policy and procedures in terms of personal and professional development

K8. Explain the reporting lines in your organisation and the limits of your authority

K9. Summarise your organisation's standards or levels of expected performance

K10. Explain your organisation's policies and procedures for dealing with poor performance

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Efficiency and service levels may relate to:**
- Monitoring and measuring performance
- Monitoring customer service satisfaction
- Monitoring costs

**2. Quality assurance initiatives may include:**
- Quality systems
- Quality standards

**3. Quality problems may include:**
- Difficult customer service situations
- Equipment breakdown/technical failure
- Failure to deliver promised service to customers
- Procedural inadequacies or failure
- Poor rosters giving rise to inadequate/inappropriate staffing levels
- Inadequate financial resources
- Delays and time difficulties
- Others

**4. Procedures and systems may be related to:**
- Customer service
- Bar and restaurant operations
- Kitchens
- Office administration
- Reservation procedures
- Housekeeping systems
- Stock control
- Security
- Safe work practices
- Record keeping
- Financial procedures
- Others

**5. Supportive feedback and coaching may relate to:**
- Performance reviews
- Advice
- Guest comments

**6. Workplace records may include:**
- Staff record
- Performance reports
- Time and wages records
- Financial records
- Cash takings
- Front office transactions, vouchers and documentation
- Customer records
- Audit records
- Stock records
- Others

**7. Workplace problems may relate to:**
- Industrial
- Customer
- Supplier
- Equipment
- Compliance
- Administrative
- Organisational
- Employee
- Others

**8. Corrective action may include:**
- New procedures and/or processes
- Changes to workplace procedures and/or processes
- Others

**Important behaviours for supervisors/managers include:**
1. Seek opportunities to improve performance
2. Find practical ways to overcome obstacles
3. Identify people's preferred ways of communicating
4. Use communication media and styles appropriate to different people and situations
5. Make time available to support others
6. Give feedback to others to help them maintain and improve their performance
7. Recognise the achievements and success of others
8. Show integrity, fairness and consistency in decision-making
9. Monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
10. Take pride in delivering high quality, accurate work
11. Seek to understand people's needs and motivations

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This unit may be assessed holistically by means of a portfolio of evidence or report on quality assuring the work of a team in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. Two examples or cases of how you monitored and checked the progress and quality of the work of team members against the standard performance expected, and the support you provided to team members to maintain and improve their performance
2. Two examples of how you identified and dealt with team problems and unforeseen events and how you motivated team members to complete the work they have been allocated on time and to the standard required
3. Two examples of how you identified unsatisfactory performance, how you discussed the causes and agreed ways of improving performance with team members
4. Two examples of how you recognised successful completion of significant pieces of work by team members and motivated team members to maintain and continuously improve their performance over time
5. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

## ASSESSMENT METHODS

**Suitable methods will include:**
- Portfolio of workplace evidence
- Observation
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HRM.CL9.04 |

# HRS10. UNIT TITLE: PLAN, ALLOCATE AND MONITOR WORK OF A TEAM

## UNIT DESCRIPTOR

This unit covers the competencies required to ensure that the work required of your team is effectively and fairly allocated and involves monitoring the progress and quality of the work of team members to ensure that the required level or standard or performance is being met.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Plan the work for your team**

P1. Confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues

P2. Plan how the team will undertake its work, identifying any priorities or critical activities and making best use of the available resources

**E2. Allocate work to team members**

P3. Allocate work to team members on a fair basis taking account of their skills, knowledge and understanding, experience and workloads and the opportunity for development

P4. Brief team members on the work they have been allocated and the standard or level of expected performance

P5. Encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated

**E3. Supervise progress and quality of work of team members**

P6. Check the progress and quality of the work of team members on a regular and fair basis against the standard or level of expected performance

P7. Provide prompt and constructive feedback

P8. Support team members in identifying and dealing with problems and unforeseen events

P9. Motivate team members to complete the work they have been allocated and provide any additional support and/or resources to help completion

P10. Monitor the team for conflict, identify the cause(s) when it occurs and deal with it promptly and effectively

**E4. Review performance of team members**

P11. Identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance with team members

P12. Recognise successful completion of significant pieces of work or work activities by team members and the overall team and advise your manager

P13. Use information collected on the performance of team members in any formal appraisal of performance

### KNOWLEDGE REQUIREMENTS

K1. Describe different ways of communicating effectively with members of a team

K2. Explain the importance of confirming/clarifying the work required of the team with your manager and how to do this effectively

K3. Discuss how to plan the work of a team, including how to identify any priorities or critical activities and the available resources

K4. Explain how to identify and take due account of health and safety issues in the planning, allocation and checking of work

K5. Explain why it is important to allocate work across the team on a fair basis and how to do so

K6. Explain why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so

K7. Summarize the ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated

K8. List the most effective ways of regularly and fairly checking the progress and quality of the work of team members

K9. Explain how to provide prompt and constructive feedback to team members

K10. Explain how to select and apply a limited range of different methods for motivating, supporting and encouraging team members to complete the work they have been allocated, improve their performance and for recognising their achievements

K11. List the additional support and/or resources which team members might require to help them complete their work and how to assist in providing this

## KNOWLEDGE REQUIREMENTS

K12. Explain why it is important to monitor the team for conflict and how to identify the cause(s) of conflict when it occurs and deal with it promptly and effectively

K13. Explain why it is important to identify unacceptable or poor performance by members of the team and how to discuss the cause(s) and agree ways of improving performance with team members

K14. List the type of problems and unforeseen events that may occur and how to support team members in dealing with them

K15. Describe how to log information on the on-going performance of team members and use this information for performance appraisal purposes.

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Performance management may be defined as:**
- A process or set of processes for establishing a shared understanding of what an individual or group is to achieve, and managing individuals in a way which increases the probability it will be achieved in both the short and longer terms

**2. Performance standards may include:**
- Key Performance Indicators (KPIs) used to measure actual performance against set targets
- Performance standards, defining the level of performance sought from an individual or group that are expressed quantitatively or qualitatively, and which may relate to:
  - Productivity
  - Punctuality
  - Personal presentation
  - Levels of accuracy in work
  - Adherence to procedures
  - Customer service standards
  - Team interaction
  - Response times
  - Waste minimization
  - Cost minimization
  - Others

**3. Systems to ensure staff performance is monitored may include:**
- Any regularly applied and formalized system where all staff have their actual workplace practice evaluated and assessed against predetermined goals/targets with a view to determining their individual level of performance or achievement
- Evaluation based on factual evidence
- Feedback on the identified performance
- Support for the individual to continue acceptable performance and redress unacceptable performance
- Counselling and disciplinary action for staff unable or unprepared to bring their performance in line with expectations and standards

**4. Appraise staff should include:**
- Conducting appraisals at regular, pre-determined intervals
- Application of appraisals across all staff, including management, full-time staff, part-time staff and casual staff
- Establishing initial targets for performance and notifying individual staff of these
- Gathering evidence of actual staff performance which should include consideration of:
  - Type of assessment/appraisal which may include peer assessment, self-assessment
  - Team assessment, use of productivity indicators including feedback from patrons
  - Methods of collecting performance data to ensure data is reliable, indicative and relevant
  - Methods of interpreting performance data, including prioritizing results and understanding
  - The data within individual contexts

**5. Advise staff of the result should include:**
- Providing evidence-based feedback of staff performance
- Agreeing on the level of concurrence between actual and required workplace performance
- Determining revised action, timelines and targets for the next phase/cycle of the appraisal process

**6. Action to take to underpin attainment of the revised targets may include:**
- Proving necessary support, such as mentoring, coaching, training, resources, information
- Providing support for out-of-work problems encountered by staff
- Re-allocation of duties and adjustment of workload
- Re-organisation of work practices
- Agreement on short-term goals for improvement
- Revisions to required workloads and/or standards
- Counselling

## CONDITIONS OF PERFORMANCE AND VARIABLES

**7. Supporting and motivating team members may include:**

- Informal but structured discussions between management and staff
- Timely delivery of support to minimize the negative impact of delays and enable linking of discussion and outcomes to recent and identified performance
- Application of suitable strategies to meet individual and company needs
- Providing the appropriate level of support during the counselling commensurate with the issues being dealt with
- Referring the staff member to external professional services, where appropriate

**Important behaviours for supervisors/ managers include:**

1. Make time available to support others
2. Clearly agree what is expected of others and hold them to account
3. Prioritise objectives and plan work to make best use of time and resources
4. State your own position and views clearly and confidently in conflict situations
5. Integrity, fairness and consistency in decision-making
6. Seek to understand people's needs and motivations
7. Take pride in delivering high quality work
8. Take personal responsibility for making things happen
9. Encourage and support others to make the best use of their abilities
10. Be vigilant for possible risks and hazards

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This unit may be assessed holistically by means of a portfolio of evidence or report on allocating and monitoring the work of a team in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. Two examples or cases of how you planned how your team will undertake its work, including detailed work schedules, timetables and other plans for individual and team work activities, tasks, production targets
2. Two examples of how you allocated work to team members on a fair basis taking account of their skills, knowledge and understanding, experience and workloads and the opportunity for development
3. Two examples of how you checked the progress and quality of the work of team members and provided prompt and constructive feedback
4. Two examples of how you identified unsatisfactory performance, how you discussed the causes and agreed ways of improving performance with team members
5. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

## ASSESSMENT METHODS

**Suitable methods will include:**

- Detailed work schedules, timetables and other plans for individual and team work activities
- Notes of team briefings to allocate individual and team work activities, tasks, targets, etc
- Personal statements (reflections on the process and reasoning behind work allocation)
- Witness statements (comments on the process of work allocation and perceptions of its fairness)
- Records of individual and team work output or production records, production/operational reports
- Notes, reports, recommendations to managers or other records of problems or critical incidents
- Health, safety or security; customers; or team members' work performance
- Notes, emails, memos or other records of formal or informal feedback or performance appraisal
- Personal statement (reflections on your own role in dealing with problems or critical incidents)
- Witness statements (comments on your own role in dealing with problems or critical incidents)

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HRM.CL9.03 |

## FMS4. UNIT TITLE: PREPARE AND ANALYSE FINANCIAL STATEMENTS AND REPORTS

### UNIT DESCRIPTOR

This unit covers the competencies required to generate financial statements required to monitor business performance and to prepare and analyse financial statements and reports.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1.    Prepare specific financial reports**
P1.    Produce the revenue report
P2.    Produce the balance sheet
P3.    Produce the profit and loss statement
P4.    Produce specific reports to meet departmental requirements

**E2.    Analyse financial statements and reports**
P5.    Analyse financial statements
P6.    Analyse financial reports
P7.    Ensure internal requirements are met
P8.    Validate the financial statements that have been prepared

**E3.    Distribute updated records**
P9.    Update internal records
P10.    Distribute the prepared financial statements and reports

---

### KNOWLEDGE REQUIREMENTS

K1.    Describe the organisation's policies and procedures in regard to preparation, presentation and distribution of financial statements including identification of the statements to be prepared
K2.    Describe relevant accounting and financial terminology. Identify the financial statements that need to be produced
K3.    List the relevant legislated accounting provisions that apply to the host country
K4.    Explain the accepted principles and standards of account preparation and presentation

K5.    Identify the frequency with which financial statements need to be produced
K6.    Identify the responsibilities and authorities that attach to the preparation of financial statements
K7.    Identify the internal requirements in relation to financial statements
K8.    Identify the format for the preparation of financial statements
K9.    Identify the distribution requirements for financial statements

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### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.    Financial statements may include:**
   · Balance sheet
   · Profit and loss statement
   · Revenue statements
   · Bank reconciliations

**2.    Revenue report should:**
   · Reflect the operating profit for the reporting period
   · Comply with organisational policy and procedures
   · Align with designated accounting requirements

**3.    Balance sheet should:**
   · Reflect the financial position of the business at the end of the reporting period
   · Comply with organisational policy and procedures
   · Align with designated accounting requirements

**4.    Profit and loss statement should:**
   · Reflect transactions over a period of time and business performance
   · Comply with organisational policy and procedures
   · Align with designated accounting requirements

## CONDITIONS OF PERFORMANCE AND VARIABLES

**5. Specific departmental financial reports may include:**

- Statement of cash flow
- Daily, weekly and monthly revenue reports
- Sales and occupancy report
- Restaurant and banquets summary
- F&B sales
- Travel receipts report
- Advance deposit report
- Guest credit report
- Refund documentation report
- Cash transaction report
- Non-cash transaction report
- Account receivable and payable transaction report
- Vouchers for payment of/in lieu of payment report
- Credit card imprints transaction report

**6. Validate the financial statements may include:**

- Ensuring statements, data and explanatory notes are error free
- Ensuring all provided information is clear, accurate, easy to understand and complete
- Ensuring statements meet necessary reporting requirements
- Making necessary additions and/or corrections

**7. Update internal records may include:**

- Entering data to reflect the current status of the financial statements
- Printing and archiving copies of the financial statements

**Important behaviours for supervisors/ managers include:**

1. Find practical ways to overcome obstacles
2. Present information clearly, concisely, accurately and in ways that promote understanding
3. Balance risks against the benefits that may arise from taking risks
4. Identify and seize opportunities to obtain resources
5. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. Act within the limits of your authority to communicate clearly the value and benefits of a proposed course of action
7. Use a range of legitimate strategies and tactics to influence people
8. Work towards win-win solutions
9. Identify the range of elements in a situation and how they relate to each other
10. Specify the assumptions made and risks involved in understanding a situation
11. Test a variety of options before taking a decision

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This unit may be assessed holistically by means of a portfolio of evidence or report on preparing a budget for a department or project in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. At least two financial statements developed
2. At least two financial reports developed
3. At least one updated internal record based on financial statements prepared and/or financial reports developed
4. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions.

## ASSESSMENT METHODS

**Suitable methods will include:**
- Portfolio of workplace evidence
- Observation
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

## RELEVANT OCCUPATIONS

All Managers or Supervisors in tourism organisations

## ACCSTP REF

D2.TFA.CL7.02

## GAS5. UNIT TITLE: PLAN, MANAGE AND CONDUCT MEETINGS

### UNIT DESCRIPTOR

This unit covers the competencies required to plan, manage and conduct meetings in order to achieve their objectives, which may be to solve problems, take decisions, and consult with people or to exchange information and knowledge.

This standard is relevant to managers and supervisors who are required to lead meetings to achieve objectives.

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**ELEMENTS AND PERFORMANCE CRITERIA**

**E1.  Plan and prepare for the meeting**

P1.  Establish the purpose and objectives of the meeting

P2.  Confirm that a meeting is the best way to achieve the objectives

P3.  Prepare carefully how you will lead the meeting and identify who needs to participate

P4.  Invite participants, giving them sufficient notice to enable them for attendance stating the importance of the meeting, the role they will be expected to play, and the preparation they need to do

P5.  Circulate relevant information in advance and, if required, brief participants individually on the content and purpose of the meeting and their roles

P6.  Set a fixed time for the meeting to begin and end and allocate time appropriately for each agenda item

**E2.  Conduct the meeting**

P7.  State the purpose of the meeting at the start and check that all participants understand why they are present and what is expected of them

P8.  Clarify specific objectives at the beginning of each agenda item

P9.  Encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants

P10.  Discourage unhelpful comments and digressions, refocusing attention on the objectives of the meeting

P11.  Manage time flexibly; giving more time to particular agenda items, if necessary, whilst ensuring key objectives are met and participants are kept informed of changes in the agenda

P12.  Summarise the discussion at appropriate times and allocate action points to participants at the end of each agenda item

P13.  Take decisions within the meeting's authority, remit or terms of reference

**E3.  Follow up the meeting**

P14.  Check that decisions and action points are accurately recorded and promptly communicated to those who need to know

P15.  Evaluate whether the purpose and objectives of the meeting have been achieved

P16.  Identify how future meetings could be

---

**KNOWLEDGE REQUIREMENTS**

K1.  Explain the importance of establishing the purpose and objectives of the meeting and how to do so

K2.  Explain the purpose of informing participants of the role they will be expected to play, the preparation they need to do and the importance of the meeting

K3.  Explain how to run the meeting to ensure the meeting meets specific objectives at the beginning of each agenda item

K4.  Explain how to encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants, and how to do so

K5.  Explain how you will discourage unhelpful comments and digressions and refocus attention on the objectives of the meeting

## KNOWLEDGE REQUIREMENTS

| | |
|---|---|
| K6. Explain the importance of summarising the discussion at appropriate times and allocating action points to participants at the end of each agenda item and how to do so | K7. Explain how to evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective |

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Meetings may relate to:**
- One-off meetings
- Regular meetings
- Group dynamics
- Teleconferences
- Video conferences
- Committee meetings
- Board meetings
- Staff meetings
- Client meetings
- Others

**2. Style of the meeting may be:**
- Formal
- Informal

**3. Arrangements for the meeting may include organising:**
- Venue
- Refreshments
- Travel arrangements for participants
- Audio-visual hire
- Supporting information and other agenda items to be discussed such as letters, submissions and reports
- Others

**4. Meeting papers may relate to:**
- Agendas
- Minutes
- Written submissions
- Documents relating to the purpose of the meeting

**Important behaviours for supervisors/ managers include:**

1. Address multiple demands without losing focus or energy
2. Listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
3. Present information clearly, concisely, accurately and in ways that promote understanding
4. Show respect for the views and actions of others
5. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. Show integrity, fairness and consistency in decision-making
7. Prioritise objectives and plan work to make the effective use of time and resources
8. Clearly agree what is expected of others and hold them to account
9. Make effective use of existing sources of information
10. Check the accuracy and validity of information
11. Model behaviour that shows, and inspires others to show, respect, helpfulness and cooperation
12. Recognise when there are conflicts, acknowledge the feelings and views of all parties, and redirect people's energy towards a common goal
13. Specify the assumptions made and risks involved in understanding a situation
14. Take timely decisions that are realistic for the situation

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is essential:**<br>1. Planning and preparation for at least 3 meetings – including examples of agendas and supporting documentation<br>2. Minutes of at least 3 meetings showing meeting decisions, follow-up action etc | **A range of assessment methods should be used to assess practical skills and knowledge. The following methods are appropriate for this unit:**<br>• Direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate<br>• Review of final printed documents<br>• Demonstration of techniques<br>• Oral or written questioning to assess knowledge of planning and conducting meetings |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HGA.CL6.05 |

# SCS3. UNIT TITLE: OPERATE BASIC SECURITY EQUIPMENT

## UNIT DESCRIPTOR

This unit describes the competencies required to select and operate security equipment and resources to provide a basic level of security within hospitality or tourism premises.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Select and prepare security equipment for use**

P1. Identify and access appropriate security equipment as required

P2. Perform pre-operational checks to equipment to ensure equipment is working as specified

P3. Identify, rectify or replace faulty and damaged equipment

P4. Identify and notify the need for training to the appropriate person

**E2. Operate security equipment**

P5. Select, use and maintain appropriate personal protective equipment and clothing

P6. Operate security equipment in a safe and controlled manner

P7. Monitor surveillance equipment

P8. Test alarms

P9. Take part in running fire drills.

**E3. Maintain security equipment and resources**

P10. Return security equipment to operational condition

P11. Arrange cleaning, maintenance and storage of security tools and equipment

P12. Report faulty or damaged security equipment and items

P13. Arrange back-up systems for faulty or damaged security equipment and items

P14. Complete internal records and reports relating to security

### KNOWLEDGE REQUIREMENTS

K1. Describe applicable legislation and company regulations for safety and security

K2. List the procedures used to check and prepare security equipment and items ready for use

K3. Explain which items of security equipment should be used in which workplace situations

K4. Describe how you monitor designated surveillance equipment and respond appropriately to situations that emerge

K5. Describe the basic repair functions on nominated items of security equipment

K6. List the security records required by your organisation and the legal requirements of Vietnam

K7. Describe the fire or emergency evacuation procedures and processes

K8. Describe the company first aid principles and procedures

K9. Explain the limits of own responsibility and authority

K10. Identify the location of emergency and security systems

K11. Identify the types of safety hazards and risks.

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Security equipment may include:**
- Communication equipment, such as a two-way radio, telephone, mobile telephone, megaphone, public address system
- Office equipment, such as a computer, camera or photocopier
- Security equipment, such as electronic screening equipment, video cameras and monitors, alarms and signals, motion sensors, personal duress alarms, static alarms
- Personal protective equipment and clothing
- Vehicles, including cars, vans, motorcycles
- Fire extinguisher and other fire equipment
- First aid kit

**2. Tasks may include:**
- Routine security monitoring of premises
- Crowd control
- Screening of property and people
- Escort of people and property
- Controlling exit and access to premises
- Responding to alarms
- Preparing documents and reports

**3. Organisational requirements may include:**
- Legal and organisational policy and procedures
- Legislation relevant to the operation, incident and/or response
- Employer and employee rights and responsibilities
- Business and performance plans
- Vehicle policy and procedures
- Policies and procedures relating to own role, responsibility and delegation
- Quality and continuous improvement processes and standards
- Occupational health and safety policies, procedures and programs
- Emergency and evacuation procedures
- Duty of care, code of conduct, code of ethics
- Records and information systems and processes
- Communication channels and reporting procedures

**4. Pre-operational checks may relate to:**
- Checking log books, maintenance register
- Reading manufacturer's instructions
- Observing and monitoring noise levels for correct operation
- Cleaning, priming, tightening, basic repairs and adjustments
- Identification and segregation of unsafe or faulty equipment for repair or replacement

**5. Faulty and damaged equipment may relate to:**
- Missing items
- Flat batteries
- Items that have not yet been serviced in response to maintenance/service requests
- Items that are not operating or performing as intended by the manufacturer
- Obtaining fully operational alternatives

**6. Personal protective equipment may include:**
- Masks
- Safety boots
- Head protection
- Safety glasses
- Gloves

**7. Operate security equipment may include:**
- Entering information into computerized systems according to software instructions and standard operating procedures
- Utilizing equipment such as intrusion alarm systems, fire systems and alarms/detectors
- Exercising personal control in the application of security items, where applicable
- Using all security equipment and items only for its designated and specified purpose/s

**8. Monitor surveillance equipment may include:**
- Setting up equipment in accordance with manufacturer's instructions
- Scheduling regular monitoring periods
- Actively monitoring the surveillance equipment by adhering to the approved monitoring schedule
- Recording evidence of scheduled monitoring activities
- Check and assess computer information and data for reliability and accuracy
- Updating information/data as required on a regular basis

**9. Testing alarm sectors may include:**
- Conducting tests in accordance with designated testing schedules
- Involving external security support companies where faults are identified in the testing procedure
- Recording evidence of testing activities

## CONDITIONS OF PERFORMANCE AND VARIABLES

**10. Internal records and reports may relate to:**
- Operational details
- Equipment faults and diagnosis
- Alarm generations
- Repairs and/or servicing undertaken
- Recommended repairs or disposal of equipment
- Testing and inspection results
- Materials used, parts and components replaced
- Costing of security equipment, maintenance and operation

**Important behaviours for supervisors/ managers include:**
1. Present information clearly, concisely, accurately and in ways that promote understanding
2. Give feedback to others to help them maintain and improve their performance
3. Continuously improve products and services
4. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
5. Make effective use of available resources
6. Recognise stakeholders' needs and interests and manage these effectively

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc. Critical aspects for assessment and evidence required to demonstrate competency in this unit

A person who demonstrates competency in this unit must be able to provide evidence of selecting and operating security equipment and resources to provide a basic level of security within hospitality or tourism premises.

**Performance assessment must include:**

1. One report on how you selected and prepared security equipment for use including performing pre-operational checks to equipment to ensure equipment is working as specified and rectifying or replacing faulty and damaged equipment
2. Two reports or witness statements on how you operated security equipment including maintenance of appropriate personal protective equipment and clothing, operating security equipment in a safe and controlled manner and monitoring surveillance equipment
3. One report on how you took part in testing alarms and running fire drills
4. One report on how you maintained security equipment and resources, arranged cleaning, maintenance and storage of security tools and equipment
5. One report showing completed internal records and reports relating to security.

## ASSESSMENT METHODS

This Unit may be assessed holistically by means of a portfolio of evidence, reports or witness statements from a supervisor or manager. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Suitable assessment methods may include:**
- Direct observation
- Naturally occurring evidence in the workplace,
- Review of portfolios of evidence
- Witness statements/third party workplace reports of on the job performance by the individual.

Oral questioning or written assessment may be used to assess underpinning knowledge. In assessment situations where the candidate is offered a choice between oral questioning and written assessment, questions are to be identical.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HSS.CL4.10 |

# FBS4.1. UNIT TITLE: MANAGE FOOD AND BEVERAGE OPERATIONS

## UNIT DESCRIPTOR

This unit describes the competencies required to manage food & beverage operations in a hotel, restaurant or other large food outlet.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Monitor and improve Food & Beverage Service**

P1.  Monitor efficiency and service levels as per standard on an on-going basis through close contact with day to day operations

P2.  Ensure quality assurance initiatives are part of food and beverage service planning

P3.  Identify quality problems and issues promptly and make appropriate adjustments and get relevant approvals

P4.  Adjust procedures and systems in consultation with colleagues to improve efficiency and effectiveness

P5.  Consult colleagues about ways to improve efficiency and service levels

P6.  Analyse training needs to improve service provision

**E2.  Plan and organise workflow**

P7.  Schedule work in a manner that enhances efficiency and customer service quality

P8.  Delegate work to appropriate people using schedules and work plans

P9.  Assess progress against agreed objectives and timelines and adjust accordingly

P10. Assist colleagues in prioritization of workload through supportive feedback and coaching

**E3.  Maintain workplace records**

P11. Complete workplace records accurately and submit within required timeframes

P12. Delegate and monitor completion of records prior to submission

**E4.  Solve problems and make decisions**

P13. Identify workplace problems promptly and analyse from an operational and customer service perspective

P14. Initiate corrective action to resolve the immediate problem where appropriate

P15. Encourage team members to participate in solving problems they raise

P16. Monitor the effectiveness of solutions in Food & Beverage Service

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### KNOWLEDGE REQUIREMENTS

K1.  Describe the health and safety standards that need to be followed with regards to the food & beverage service operations

K2.  Explain how F&B service integrates with other departments

K3.  Explain how to allocate work to staff

K4.  Explain how to monitor responsibilities to ensure standards are maintained

K5.  Explain how to identify training needs

K6.  Explain how to ensure that staff have the skills and knowledge to carry out their work effectively

K7.  Explain how to brief staff, for example verbal instructions, written instructions, demonstrations or diagrams

K8.  Explain how to give feedback to staff in a way that motivates them

K9.  Explain how to alter work allocation in order to improve the service

K10. Explain how to monitor the allocation and use of F&B resources

K11. Identify the types of problems that may occur in F&B service

K12. Explain how to deal with problems with the F&B service

K13. Describe how to report problems with F&B service

K14. Explain the limits of own authority when dealing with problems

K15. Explain why it is important to review procedures

K16. Explain how to identify and suggest possible ways of improving the F&B service.

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Service levels may include:**
- Excellent service
- Acceptable service
- Bad service

**2. Brief staff on F&B duties may include:**
- Procedures
- Service skills
- Work routines
- Standard of behaviour

**3. Methods to brief staff on F&B duties may include:**
- Verbal instructions
- Written instructions
- Demonstrations
- Diagrams

**4. The health and safety standards would apply to:**
- Customers
- Staff
- The organisation

## ASSESSMENT GUIDE

This unit may be assessed holistically by means of a portfolio of evidence or report on aspects of managing discipline in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation.

**Assessment evidence should include:**

1. At least two examples of quality problems and issues identified and how appropriate adjustments/approvals were made in consultation with colleagues
2. At least two examples of scheduling, work plans and delegation that helped enhance efficiency and customer service quality
3. At least two examples of how you assisted colleagues in prioritization of workload through supportive feedback, training and coaching
4. At least two examples of how you identified workplace problems and initiated corrective action to resolve the immediate problems

## ASSESSMENT METHODS

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

**Suitable methods will include:**
- Portfolio of workplace evidence to include notes of meetings, notes of discussion with individuals and colleagues, details of support and advice provided to individuals, record of feedback etc. (without named individuals)
- Observation
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

## RELEVANT OCCUPATIONS

F&B Manager, F&B Assistant Manager, Restaurant Manager, Restaurant Supervisor, Team Leader

## ACCSTP REF

D1.HML.CL10.10 & 12

# HRS1. UNIT TITLE: IDENTIFY STAFF DEVELOPMENT NEEDS

## UNIT DESCRIPTOR

This unit covers the competencies required to help staff identify the knowledge, skills and competence they need to develop in order to meet the demands of their current and future work roles and to fulfil their personal aspirations.

This standard is relevant to managers and supervisors who have people reporting to them.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Agree individual staff development needs**

P1.  Agree with individuals the knowledge, skills and competence required to meet the demands of their current and potential future work roles

P2.  Encourage individuals to seek feedback on their performance from those who are able to provide objective, specific and valid feedback

P3.  Provide opportunities for individuals to make an accurate assessment of their current levels of knowledge, skills and competence and of their potential

P4.  Evaluate with individuals any additional, or higher levels of, knowledge, skills and competence they need for their current work roles, potential future work roles and their personal aspirations

P5.  Identify and evaluate any learning difficulties or particular needs individuals may have

**E2.  Support staff in setting their own learning objectives**

P6.  Support individuals in prioritising their needs and specifying their learning objectives

P7.  Encourage individuals to focus on their prioritised learning needs and to take account of their learning styles when selecting learning activities and planning their development

P8.  Seek advice and support from HR training and development specialists, when required

---

### KNOWLEDGE REQUIREMENTS

K1.  Explain the differences between knowledge, skills and competence

K2.  Explain the importance of objective, specific and valid feedback in identifying learning needs

K3.  Describe how to analyse the gaps between current levels of knowledge, skills and competence and the levels required

K4.  Describe how to prioritise learning needs

K5.  Explain how to establish SMART (Specific, Measurable, Agreed, Realistic, Time-bound) learning objectives

K6.  Describe learning styles and how to identify individuals' preferred learning styles

K7.  Describe the tools used in your organisation to identify individual learning needs and styles

K8.  List the types of learning activities appropriate for different learning styles

K9.  Explain how to develop learning and development plans based on a sound analysis of learning needs and styles

K10. Describe the knowledge, skills and competence requirements for different roles within your area of responsibility

K11. Describe your organisation's personal and professional development policy and practices

K12. Describe the learning opportunities available in your organisation

K13. List the sources of specialist advice and support in your organisation

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **Knowledge, skills and competence required to meet the demands of current and potential future work roles could include:**
   - Job-related knowledge, including technical or industry knowledge
   - Skills development, including technical skills
   - Supervisory or management development

2. **Those who are able to provide objective, specific and valid feedback on their performance feedback could include:**
   - Managers
   - Colleagues
   - HR Department
   - Guests

3. **Learning difficulties or particular individual needs may include:**
   - Availability for training and development due to job demands
   - Language level, relevant experience or technical limitations

4. **Learning styles would include:**
   - Activist learner – prefers to take part in practical learning followed by learning the theory
   - Reflective learner – prefers to take part in learning and reflecting on the experience
   - Theorist learner – prefers to study and understand the learning before putting into practice
   - Pragmatist learner – prefers learning and putting learning into practice

**Important behaviours for supervisors/managers include:**
1. Seize opportunities presented by the diversity of people
2. Show empathy with others' needs, feelings and motivations and take an active interest in their concerns
3. Support others to make effective use of their abilities
4. Support others to realise their potential and achieve their personal aspirations
5. Develop knowledge, understanding, skills and performance in a systematic way
6. Inspire others with the desire to learn
7. Check the accuracy and validity of information
8. Identify the implications or consequences of a situation

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc. This unit may be assessed holistically by means of a portfolio of evidence or report on aspects of identifying staff development needs in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/ managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.<br><br>Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation.<br><br>**This unit should be assessed by portfolio evidence of performance and oral or written questioning. Evidence must include:**<br><br>1. Two documented examples or cases when the manager helped identify staff development needs<br>2. Two documented examples or cases when the manager provided opportunities for individuals to take further learning, training or development opportunities to gain knowledge, skills or competence to enhance their job performance<br>3. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions | Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.<br><br>**Suitable methods will include:**<br>• Portfolio of workplace evidence to include notes of meetings, notes of discussion with individuals and colleagues, details of support and advice provided to individuals, record of feedback  etc (without named individuals)<br>• Personal statements<br>• Witness testimony<br>• Professional discussion<br><br>Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.<br><br>A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met. |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HHR.CL8.05 |

# HRS4. UNIT TITLE: INITIATE AND FOLLOW DISCIPLINARY PROCEDURES

## UNIT DESCRIPTOR

This unit covers the competencies required to help members of your team address problems affecting their performance. These may be work-related problems or problems arising from their personal circumstances.

The unit involves identifying problems affecting people's performance and discussing these in a timely way with the team members concerned to help them find a suitable solution to their problem. Sometimes you may need to refer the team member to HR Department or senior manager for further action.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Communicate with subordinates and colleagues**

P1. Keep individuals fully informed about the standards of conduct and performance expected of them and your organisation's current procedure for dealing with misconduct or unsatisfactory performance

P2. Seek support from colleagues or human resources specialists on any aspects of implementing disciplinary procedures about which you are unsure

**E2. Carry out investigations and take preventative measures**

P3. Carry out necessary investigations promptly to establish the facts relating to any misconduct or unsatisfactory performance

P4. Take preventative measures to resolve issues and deal with cases of minor misconduct or unsatisfactory performance informally, where you consider that an informal approach is likely to resolve the situation effectively

**E3. Follow disciplinary procedures and maintain records**

P5. Follow your organisation's formal disciplinary procedure in serious cases of misconduct or unsatisfactory performance

P6. Keep full and accurate records throughout the disciplinary process and store these confidentially as long as, but no longer as, necessary

### KNOWLEDGE REQUIREMENTS

K1. Explain the importance of fully informing individuals about the standards of conduct and performance expected of them and your organisation's current procedure for dealing with misconduct or unsatisfactory performance

K2. Describe how to carry out investigations to establish facts relating to any misconduct or unsatisfactory performance

K3. Discuss informal approaches to dealing with cases of minor misconduct or unsatisfactory performance, and when this type of approach is likely to resolve the situation effectively

K4. Compare the differences between misconduct, gross misconduct and unsatisfactory performance, and how each should be handled

K5. Discuss the importance of following your organisation's formal disciplinary procedure in serious cases of misconduct or unsatisfactory performance

K6. Illustrate the importance of communicating clearly, concisely and objectively, and how to do so

K7. Describe how to keep full and accurate records throughout the disciplinary process and store these confidentially as long as, but no longer than, necessary

K8. Summarise your organisation's procedures for dealing with misconduct or unsatisfactory performance

K9. Identify the standards of conduct and performance expected of individuals

K10. List the sources of advice, guidance and support from colleagues, human resources or others

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Communication with subordinates and colleagues could be by:**
- Email, telephone, SMS, face-to-face, instant messaging or other means

**2. Support from colleagues or HR specialists could include:**
- Advice on legal procedures
- Advice on organisational procedures
- Support in planning coaching sessions
- Help with resources for coaching sessions

**3. Investigations measures could include:**
- Investigations with HRD, senior managers or others to establish the facts relating to any misconduct or unsatisfactory performance

**4. Preventative measures to resolve issues and deal with cases of minor misconduct or unsatisfactory performance could include:**
- Informal discussion with staff
- Appraisal or performance review
- Warning letter if the issue has occurred frequently
- Referral to HR department

**5. Disciplinary procedures could include:**
- Verbal warning
- Written warning
- Internal transfer
- Suspension from the workplace

**6. Confidential records could include:**
- Minutes of meetings
- Appraisal forms
- Incident report forms
- Letters and emails
- Other documents

**Important behaviours for supervisors/managers include:**
1. Listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
2. Present information clearly, concisely, accurately and in ways that promote understanding
3. Keep people informed of plans and developments in a timely way
4. Give feedback to others to help them maintain and improve their performance
5. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. Act within the limits of your authority
7. Refer issues outside the limits of your authority to appropriate people
8. Show integrity, fairness and consistency in decision making
9. Say no to unreasonable requests
10. Address performance issues promptly and resolve them directly with the people involved
11. Protect the confidentiality and security of information
12. Take and implement difficult and/or unpopular decisions, if necessary

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc. This unit may be assessed holistically by means of a portfolio of evidence or report on aspects of managing disciplinary procedures in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. Two documented examples or cases of communications to staff and colleagues about disciplinary conduct
2. Two documented examples of carrying out investigations to establish facts about misconduct or unsatisfactory performance
3. One documented example of a preventative measures taken to resolve issues and deal with cases of minor misconduct or unsatisfactory performance
4. One documented example of a formal disciplinary procedure in a serious cases of misconduct or unsatisfactory performance
5. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

**Possible examples of evidence**
**Records of your involvement in disciplinary procedures:**

- Notes of briefings and meetings; e-mails and memos; handbooks, procedure manuals and other guidance which you have prepared for team members on disciplinary procedures and systems
- Notes of meetings with individuals such as performance reviews, supervision meetings, notes of disciplinary investigations
- Memos, e-mails from specialists on conduct of disciplinary procedures
- Letters, memos, e-mails from, and notes of conversations with colleagues or managers regarding an individual's performance and behaviour
- Notes, records of disciplinary procedures in which you have been involved
- Personal statement (your reflections on your role in initiating and following disciplinary procedures)

## ASSESSMENT METHODS

**Suitable methods will include:**
- Portfolio of workplace evidence to include notes of meetings, notes of discussion with individuals and colleagues, details of support and advice provided to individuals, record of performance review meetings etc (without named individuals)
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HRM.CL9.04 |

## HRS5. UNIT TITLE: RECRUIT, SELECT AND RETAIN STAFF

### UNIT DESCRIPTOR

This unit covers the competencies required to recruit and select people to undertake identified activities or work roles within your area of responsibility.

This standard is not intended for human resources specialists. It is relevant to managers and supervisors who are responsible for recruiting and selecting people for their organisation or their particular area of responsibility.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Plan recruitment of appropriate people**

P1. Review, on a regular basis, the work required in your area of responsibility, identifying any shortfall in the number of people or their knowledge, skills and competence

P2. Identify and evaluate the options for addressing any identified shortfalls and decide on the best options to follow

P3. Engage appropriate HR professionals within your organisation in recruiting and selecting people

P4. Ensure you comply with your organisation's recruitment and selection policies and procedures

**E2. Prepare for recruitment and selection**

P5. Ensure the availability of up-to-date job descriptions and person specifications where there is a need to recruit

P6. Establish the stages in the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved

P7. Ensure that any information on vacancies is fair, clear and accurate before it goes to potential applicants

P8. Draw up fair, clear and appropriate criteria for assessing and selecting applicants, taking into account their knowledge, skills and competence and their potential to work effectively with colleagues

P9. Ensure the recruitment and selection process is carried out fairly, consistently and effectively

**E3. Manage the selection process**

P10. Keep applicants fully informed about the progress of their applications, in line with organisational policy

P11. Offer positions to applicants who best meet the selection criteria

P12. Provide clear, accurate and constructive feedback to unsuccessful applicants, in line with organisational policy

P13. Evaluate whether the recruitment and selection process has been successful and identify any areas for improvements

**E4. Optimise staff retention activities**

P14. Seek to provide work opportunities that challenge individuals to make effective use of their knowledge, skills and competences and develop their potential

P15. Review individuals' performance and development systematically and provide feedback designed to improve their performance

P16. Recognise individuals' performance and recognise their achievements in line with your organisation's policy

P17. Identify when individuals are dissatisfied with their work or development and seek with them solutions that meet both the individual's and organisation's needs

P18. Recognise when individuals' values, motivations and aspirations are incompatible with your organisation's vision, objectives and values and seek alternative solutions with the individuals concerned

P19. Discuss their reasons with individuals planning to leave your organisation and seek to resolve any issues or misunderstandings

## KNOWLEDGE REQUIREMENTS

K1. Discuss how to engage employees and other stakeholders in recruitment, selection and retention activities

K2. Describe how to review the workload in your area in order to identify shortfalls in the number of colleagues and the pool of knowledge, skills and competence

K3. Explain what job descriptions and person specifications should cover and why it is important to consult with others in producing or updating them

K4. Discuss the different stages in the recruitment and selection process and why it is important to consult with others on the stages, recruitment and selection methods to be used, associated timings and who is going to be involved

K5. Evaluate the different recruitment and selection methods and their associated advantages and disadvantages

K6. Explain why it is important to give fair, clear and accurate information on vacancies to potential applicants

K7. Discuss how to measure applicants' competence and capability and assess whether they meet the stated requirements of the vacancy

K8. How to take account of equality, diversity and inclusion issues, including legislation and any relevant codes of practice, when recruiting and selecting people and keeping colleagues

K9. Explain the importance of keeping applicants informed about progress and how to do so

K10. Discuss the importance of providing opportunities for individuals to discuss issues with you alternative solutions that may be deployed when individuals' values, motivations and aspirations are incompatible with their work or your organisation's vision, objectives and values

K11. Discuss the importance of understanding the reasons why individuals are leaving an organisation

K12. Describe the specialist resources available to support recruitment, selection and retention, and how to make use of them

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **Policies and procedures in relation to the recruitment and selection process may include:**
   - Details of information that may and may not be used in a job advertisement
   - Staff promotion policies, especially internal promotions
   - Staff training
   - Remuneration
   - Probationary periods
   - Terms and conditions of employment
   - Benefits
   - Individual staff policy, such as uniform, personal presentation, smoking, tact and diplomacy, sickness, attendance and punctuality, use of company property
   - Composition of interview and selection panels

2. **Job specification refers to:**
   - All the information about the type of employee needed to do a particular job effectively

3. **The job description refers to:**
   - All the information about the job tasks

4. **Key selection criteria may relate to:**
   - Experience
   - Competencies
   - Qualifications
   - Compatibility
   - References
   - Attitudes

5. **Sources of staff recruitment may include:**
   - Media advertisements
   - Job and recruitment agencies
   - Online recruitment
   - Internal advertising including internal promotions
   - Schools and trade colleges
   - Industry network contacts
   - Other employers

6. **Selection interview may include:**
   - One-on-one and face-to-face interviews
   - Panel interviews
   - Group interviews
   - Over-the-phone interviews
   - First, second and/or third interviews
   - Applying appropriate questioning and listening techniques
   - Recording answers supplied by applicants
   - Responding to applicant questions
   - Equity and compliance issues
   - Devising questions to be asked of all applicants

7. **Selection may relate to:**
   - Rating applicants against selection criteria
   - Obtaining feedback and consensus from all interviewers
   - Considering test results
   - Ranking interviewees

8. **Follow up successful applicants may relate to:**
   - Obtaining original copies of documents presented at interviews
   - Explaining details of the job offer, contract or employment instrument
   - Confirming acceptance of the job offer
   - Offering the job to another applicant if the first choice refuses the offer

9. **Retention policies can include:**
   - Provision of work opportunities that challenge individuals to make effective use of their knowledge, skills and competences and develop their potential
   - Review of individuals' performance and development systematically
   - Methods of feedback designed to improve staff performance
   - Recognition of individuals' performance and achievements in line with your organisation's policy
   - Identification of work roles that meet both the individual's and organisation's needs
   - Recognition of incompatibility of staff with work roles
   - Staff exit policies

**Important behaviours for supervisors/ managers include:**

1. Identify people's information needs
2. Present information clearly, concisely, accurately and in ways that promote understanding
3. Keep people informed of plans and developments in a timely way
4. Give feedback to others to help them maintain and improve their performance
5. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. Act within the limits of your authority
7. Show integrity, fairness and consistency in decision-making
8. Protect the confidentiality and security of information
9. Check the accuracy and validity of information
10. Take and implement difficult and/or unpopular decisions, where necessary

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This unit may be assessed holistically by means of a portfolio of evidence or report on aspects of managing recruitment, selection and retention of staff in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. Two documented examples or cases of recruitment and selection of staff to meet organisational staffing needs
2. Two documented examples or cases of retention activities
3. One documented example of an exit interview to establish reasons for staff leaving a job
4. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

## ASSESSMENT METHODS

**Suitable methods will include:**
- Portfolio of workplace evidence
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HRM.CL9.10 |

# HRS6. UNIT TITLE: HANDLE STAFF GRIEVANCES AND RESOLVE PROBLEMS

## UNIT DESCRIPTOR

This unit covers the competencies required to initiate and follow your organisation's grievance procedure in response to a concern, problem or complaint raised by a member of your team.

This unit describes the minimum standard of performance expected of managers when they are implementing grievance procedures in line with legal and organisational requirements. To meet this standard, managers need both sound technical knowledge of the procedures and well-developed cognitive and interpersonal skills.

The unit is for line managers who have to deal with potential or actual grievances raised by members of their team. It is not designed for human resources specialists.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Inform staff about grievance procedures**

P1.  Keep individuals fully informed about your organisation's current procedure for raising grievances

P2.  Seek support from colleagues or human resources or legal specialists on any aspects of implementing grievance procedures about which you are unsure

**E2.  Implement grievance procedures**

P3.  Identify potential grievances and take preventative measures to resolve issues where possible

P4.  Respond to concerns, problems or complaints from individuals and seek to resolve the situation informally if possible

P5.  Follow your organisation's formal grievance procedure, if an individual raises a grievance with you in writing

**E3.  Maintain accurate records**

P6.  Keep full and accurate records throughout the grievance process and store these confidentially as long as, but no longer than, necessary

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### KNOWLEDGE REQUIREMENTS

K1.  Explain the importance of fully informing individuals about your organisation's current procedure for raising grievances

K2.  Explain informal approaches to dealing with concerns, problems or complaints raised with you, and when this type of approach is likely to resolve the situation effectively

K3.  Explain the importance of following your organisation's formal grievance procedure, and when to do so

K4.  Describe how to conduct a meeting with an individual to discuss their grievance

K5.  Describe how to investigate the grievance fully

K6.  Explain the importance of communicating clearly, concisely and objectively, and how to do so

K7.  Describe how to keep full and accurate records throughout the grievance process and store these confidentially as long required

K8.  Summarise your organisation's procedure for dealing with grievances

K9.  Identify sources of advice, guidance and support from colleagues, human resources or legal specialists

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## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Informing staff about grievance procedures involves:**
- Keeping individuals fully informed about current procedure for raising grievances
- Seeking support from colleagues or human resources or legal specialists

**2. Implementing grievance procedures includes:**
- Identifying potential grievances before they become an issue
- Taking preventative measures to resolve issues where possible
- Responding to concerns, problems or complaints informally to resolve the situation if possible
- Considering whether an informal approach is likely to resolve the situation effectively
- Following your organisation's formal grievance procedure, if an individual raises a grievance with you in writing

**3. Keeping full and accurate records includes:**
- Ensuring that full records are kept throughout the grievance process
- Ensuring records are stored confidentially for as long as required

**Important behaviours for supervisors/ managers include:**
1. Listen actively, ask questions, clarify points and restate or rephrase statements to check mutual understanding
2. Present information clearly, concisely, accurately and in ways that promote understanding
3. Keep people informed of plans and developments in a timely way
4. Give feedback to others to help them maintain and improve their performance
5. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. Act within the limits of your authority
7. Refer issues outside the limits of your authority to appropriate people
8. Show integrity, fairness and consistency in decision making
9. Say no to unreasonable requests
10. Address performance issues promptly and resolve them directly with the people involved
11. Protect the confidentiality and security of information
12. Take and implement difficult and/or unpopular decisions, if necessary

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This Unit may be assessed holistically by means of a portfolio of evidence or report on initiating and following grievance procedures of staff in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/ managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. One documented example of handling an informal grievance procedure
2. One documented examples or cases handling a formal grievance procedure
3. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

## ASSESSMENT METHODS

**Suitable methods will include:**
- Portfolio of workplace evidence
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the Evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | N/A |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | N/A |

# HRS11. UNIT TITLE: IMPLEMENT OCCUPATIONAL HEALTH AND SAFETY PRACTICES

## UNIT DESCRIPTOR

This unit covers the competencies required to manage the overall health and safety process in your area of responsibility. It is intended to go beyond meeting health and safety legislation and move towards a situation where health and safety considerations are firmly embedded in the planning and decision-making processes and the 'culture' of your area of responsibility. The 'area of responsibility' may be, for example, a department or functional area or an operating site such as a hotel or tour company office.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Implement health and safety policy**

P1. Identify your personal responsibilities and liabilities under health and safety legislation

P2. Ensure that the organisation's written health and safety policy statement is clearly communicated to all people in your area of responsibility and other relevant parties

P3. Ensure that the health and safety policy statement is put into practice in your area of responsibility and is subject to review as situations change and at regular intervals and the findings passed to the appropriate people for consideration

**E2. Ensure consultation with health & safety personnel**

P4. Ensure regular consultation with people in your area of responsibility or their representatives on health and safety issues

P5. Seek and make use of specialist expertise in relation to health and safety issues

**E3. Ensure systems are in place for identifying and monitoring risk**

P6. Ensure that a system is in place for identifying hazards and assessing risks in your area of responsibility and that prompt and effective action is taken to eliminate or control identified hazards and risks

P7. Ensure that systems are in place for effective monitoring, measuring and reporting of health and safety performance in your area of responsibility

**E4. Develop & improve health and safety performance**

P8. Show continuous improvement in your area of responsibility in relation to health and safety performance

P9. Make health and safety a priority area in terms of informing planning and decision-making in your area of responsibility

P10. Demonstrate that your own actions reinforce the messages in the organisation's health and safety policy statement

P11. Ensure that sufficient resources are allocated across your area of responsibility to deal with health and safety issues

P12. Develop a culture within your area of responsibility which puts 'health and safety' first

### KNOWLEDGE REQUIREMENTS

K1. Explain why health and safety in the workplace is important

K2. Describe how and where to identify your personal responsibilities and liabilities under health and safety legislation

K3. Explain how to keep up with legislative and other developments relating to health and safety

K4. Summarise the requirement for organisations to have a written health and safety policy statement

K5. Explain how to communicate the written health and safety policy statement to people who work in your area of responsibility and other relevant parties

K6. Describe how and when to review the application of the written Health and safety policy statement in your area of responsibility and produce/provide findings to inform development

K7. Explain how and when to consult with people in your area of responsibility or their representatives on health and safety issues

K8. Identify sources of specialist expertise in relation to health and safety

K9. List ways of developing a culture in your area of responsibility which puts 'health and safety' first

## KNOWLEDGE REQUIREMENTS

K10. Describe the type of hazards and risks that may arise in relation to health and safety – how to establish and use systems for identifying hazards and assessing risks and the type of actions that should be taken to control or eliminate them

K11. Explain how to establish systems for monitoring, measuring and reporting on health and safety performance in your area of responsibility

K12. Explain why and how health and safety should inform planning and decision-making

K13. Explain the importance of setting a good example to others in relation to health and safety

K14. Define the type of resources required to deal with health and safety issues

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Relevant health and safety information may include:**
- Roles and responsibilities of personnel
- Legal obligations
- Participative arrangements for health and safety
- Location of relevant health and safety information, procedures and policies
- Specific risks and necessary control measures
- Codes of practice

**2. Hazards and risks may include:**
- Fire and emergency
- Crowd related risks
- Bomb scares
- Theft and armed robbery
- Equipment failure
- Pests
- Equipment related hazards
- Manual handling
- Slips, trips and falls
- Drugs and alcohol in the workplace
- Violence in the workplace
- Hazardous substances
- Others

**3. Records may include:**
- Health and safety injury register
- Number of near-misses
- Health and safety improvement ideas submitted by team members
- Medical records
- Health and safety training records
- Team member hazards reports
- Others

**4. Developing and improving health and safety performance may include:**
- Workshops
- Information sessions
- Fact sheets and other literature
- Mentoring
- Lectures
- Practical demonstrations
- Health and safety team meetings

**Important behaviours for supervisors/ managers include:**

Behaviours which underpin effective performance:
1. Respond quickly to crises and problems with a proposed course of action
2. Identify people's information needs
3. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
4. Be vigilant for possible risks and hazards
5. Take personal responsibility for making things happen
6. Identify the implications or consequences of a situation
7. Act within the limits of your authority
8. Constantly seek to improve performance
9. Treat individuals with respect and act to uphold their rights

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This unit may be assessed holistically by means of a portfolio of evidence or report on implementing occupational health and safety in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. At least one record of actions you have taken to ensure health and safety policies are implemented appropriately
2. At least two minutes of meetings you have organised with people in your area of responsibility, or their representatives, and those with specialist expertise, to discuss, review and agree the implementation of workplace policies on health and safety
3. At least one briefing or presentation you have made or commissioned to people in your area of responsibility on the implementation of workplace policies on health and safety
4. At least one record of training activity you have organised for people in your area of responsibility on the implementation of workplace policies on health and safety
5. One personal statement (reflection on your role in ensuring that health and safety policies are implemented and reviewed in your area of responsibility)
6. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

## ASSESSMENT METHODS

**Suitable methods will include:**
- Portfolio of workplace evidence
- Observation
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

## RELEVANT OCCUPATIONS

All staff with supervisory or management responsibility in tourism occupations

## ACCSTP REF

D1.HSS.CL4.01, 02 & 04

# FMS1. UNIT TITLE: PREPARE BUDGETS

## UNIT DESCRIPTOR

This unit covers the competencies required for managers with responsibility for preparing budgets for their departments.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Prepare budget information**

P1.  Identify and interpret sources of data required for budget preparation

P2.  Review and analyse data

P3.  Obtain other stakeholder input into budget plan

P4.  Provide relevant colleagues with the opportunity to contribute to the budget planning process

**E2.  Draft budget**

P5.  Draft budget, based on analysis of all available information

P6.  Estimate income and expenditure using valid, reliable and relevant information

P7.  Review income and expenditure for previous time periods to help with budget forecast

**E3.  Present budget recommendations**

P8.  Present recommendations clearly, concisely and in an appropriate format

P9.  Circulate draft budget to relevant colleagues for comment

P10.  Adjust budget and complete the final budget within designated timelines

P11.  Inform colleagues of final budget decisions

### KNOWLEDGE REQUIREMENTS

K1.  Explain how to engage stakeholders in identifying and justifying requirements for financial resources.

K2.  Explain how to identify and interpret sources of data required for budget preparation

K3.  Explain how to provide relevant colleagues with the opportunity to contribute to the budget planning process

K4.  Explain how you present budget recommendations to others

K5.  Describe how to calculate fixed and variable costs of activities.

K6.  Describe cost-benefit analysis techniques

K7.  Explain the importance of developing alternative solutions as fullback positions.

K8.  Explain the importance of obtaining feedback on your presentation of the budget and how to use this feedback to improve future proposals

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Data and data sources required for budget preparation may include:**
- Performance data from previous periods
- Financial proposals from key stakeholders
- Financial information from suppliers
- Customer or supplier research
- Competitor research
- Management policies and procedures
- Organisational budget preparation guidelines

**2. Internal and external issues that could impact on budget development may include:**
- Organisational and management re-structures
- Enterprise/organisational objectives
- New legislation or regulation
- Growth or decline in economic conditions
- Significant price movement for certain commodities or items
- Shift in market trends
- Scope of the project
- Venue availability (for events)
- Human resource requirements
- Others

**3. Budgets may include:**
- Cash budgets
- Departmental budgets
- Wages budgets
- Project budgets
- Event budgets
- Sales budgets
- Cash flow budgets
- Grant funding budgets
- Others

**4. Input may include:**
- Budget restrictions
- Client expectations
- Owners/stakeholders expectations
- Others

**5. Recommendations may include:**
- Budget restrictions
- Operational budgets
- Contingency plan

**6. Budget decisions may refer to:**
- Increase/decrease in allocations
- Cost-cutting decisions, such as redundancy, closing departments or outlets, etc
- Expansion decisions, such as employing more staff, opening new outlets/departments, etc

**7. Financial commitments may relate to:**
- Contracts related to expenditure
- Contracts related to income

**Important behaviours for supervisors/ managers include:**
1. Recognise changes in circumstances promptly and adjust plans and activities accordingly
2. Find practical ways to overcome obstacles
3. Present information clearly, concisely, accurately and in ways that promote understanding
4. Balance risks against the benefits that may arise from taking risks
5. Identify and seize opportunities to obtain resources
6. Take repeated or different actions to overcome obstacles
7. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
8. Act within the limits of your authority communicate clearly the value and benefits of a proposed course of action
9. Use a range of legitimate strategies and tactics to influence people
10. Work towards win-win solutions
11. Respond positively and creatively to setbacks
12. Identify the range of elements in a situation and how they relate to each other
13. Specify the assumptions made and risks involved in understanding a situation
14. Test a variety of options before taking a decision

## ASSESSMENT GUIDE

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This unit may be assessed holistically by means of a portfolio of evidence or report on preparing a budget for a department or project in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. At least one minute of meetings you have organised with people in your area of responsibility and those with specialist expertise, to discuss, review and agree the budget for your department or team
2. One draft budget prepared for your department
3. One approved and implemented budget for your department
4. Notes of a meeting or email/letter in which you received approval for the prepared budget
5. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

## ASSESSMENT METHODS

**Suitable methods will include:**
· Portfolio of workplace evidence
· Observation
· Personal statements
· Witness testimony
· Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Supervisors or Manager in tourism occupations | D1.HFA.CL7.07 |

# FMS3. UNIT TITLE: MANAGE BUDGETS

## UNIT DESCRIPTOR

This unit covers the competencies required in managing the budget for your area of responsibility or for specific projects or activities. This standard is relevant to managers and leaders with budget responsibility for an operational area or for specific projects or activities.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Monitor and control budget activity**

P1.  Use the agreed budget to actively monitor and control performance for your area of responsibility, activity or project

P2.  Engage appropriate colleagues and other key stakeholders in managing budgets

P3.  Identify the causes of any significant variances between what was budgeted and what actually happened and take prompt corrective action, obtaining agreement from those with decision-making responsibility, if required

**E2.  Review and adjust budget as necessary**

P4.  Propose revisions to the budget, if necessary, in response to variances and/or significant or unforeseen developments and discuss and agree the revisions with those with decision-making responsibility

P5.  Provide on-going information on performance against the budget to those with decision-making responsibility

P6.  Advise relevant people promptly if you have identified evidence of potentially fraudulent activities

P7.  Gather information from implementation of the budget to assist in the preparation of future budgets

### KNOWLEDGE REQUIREMENTS

K1.  Explain how to engage colleagues and stakeholders in managing budgets

K2.  Explain the purposes of budgetary systems

K3.  Explain how to use a budget to actively monitor and control performance for a defined area or activity of work

K4.  Define the main causes of variances and how to identify them

K5.  Evaluate the different types of corrective action which could be taken to address identified variances

K6.  Describe how unforeseen developments can affect a budget and how to deal with them

K7.  Explain the importance of agreeing revisions to the budget and communicating the changes

K8.  Explain the importance of providing regular information on performance against the budget to other people

K9.  Identify types of fraudulent activities and how to identify them

K10.  Describe what to do and who to contact if you suspect fraud has been committed

K11.  Identify who needs information in your organisation about performance against your budget, what information they need, when they need it and in what format

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Internal and external issues that could impact on budgets may include:**
- Organisational and management re-structures
- Enterprise/organisational objectives
- New legislation or regulation
- Growth or decline in economic conditions
- Significant price movement for certain commodities or items
- Shift in market trends
- Scope of the project
- Venue availability (for events)
- Human resource requirements
- Others

**2. Budget may include:**
- Cash budgets
- Departmental budgets
- Wages budgets
- Project budgets
- Event budgets
- Sales budgets
- Cash flow budgets
- Grant funding budgets
- Others

**3. Input may include:**
- Budget restrictions
- Client expectations
- Owners/stakeholders expectations
- Others

**4. Recommendations may include:**
- Budget restrictions
- Operational budgets
- Contingency plan

**5. Budget decisions may refer to:**
- Increase/decrease in allocations
- Cost-cutting decisions, such as redundancy, closing departments or outlets, etc.
- Expansion decisions, such as employing more staff, opening new outlets/departments, etc.

**6. Financial commitments may relate to:**
- Contracts related to expenditure
- Contracts related to income

**7. Fraud could include:**
- Account takeover
- Application fraud
- Exploiting assets and information
- Fake invoice scams
- False accounting
- Payment fraud
- Procurement fraud
- Receipt fraud
- Travel and subsistence fraud

**Important behaviours for supervisors/ managers include:**
1. Recognise changes in circumstances promptly and adjust plans and activities accordingly
2. Present information clearly, concisely, accurately and in ways that promote understanding
3. Keep people informed of plans and developments in a timely way
4. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
5. Act within the limits of your authority
6. Identify and raise ethical concerns
7. Accurately calculate risks, and make provision so that unexpected events do not impede the achievement of objectives
8. Monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
9. Make effective use of existing sources of information
10. Check the accuracy and validity of information
11. Communicate clearly the value and benefits of a proposed course of action
12. Work towards win-win solutions

## ASSESSMENT GUIDE

This unit may be assessed holistically by means of a portfolio of evidence or report. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation and in the case of budgets, no names of companies or individuals should be included in portfolio or documentary evidence.**

1. Two examples/cases demonstrating how you monitored and controlled budget activity for your area of responsibility, activity or project. Examples should show how you engaged appropriate colleagues and other key stakeholders in managing budgets
2. One example/case where you identified causes of any significant variances between what was budgeted and what actually happened and the corrective action you took
3. One example of how you proposed revisions to the budget in response to variances and/or significant or unforeseen developments

## ASSESSMENT METHODS

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

**Suitable methods will include:**
- Portfolio of workplace evidence to include notes of meetings, notes of discussion with individuals and colleagues, details of support and advice provided to individuals, record of feedback etc. (without named individuals)
- Observation
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

**Assessing knowledge and understanding:**
Knowledge and understanding are key components of competent performance. Where knowledge and understanding (and the handling of contingency situations) is not apparent from performance evidence, it must be assessed by other means and be supported by suitable evidence such as:

- Documented answers to oral questioning
- Written examination

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HFI.CL8.03 |

## CMS1. UNIT TITLE: MANAGE QUALITY SERVICE AND CUSTOMER SATISFACTION

### UNIT DESCRIPTOR

This unit covers the competencies required to manage the delivery of quality customer services in a hotel, travel or tour company.

This standard is relevant to managers and supervisors who are required to manage the delivery of customer service as part of a broader management role.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Communicate quality customer service standards**

P1. Engage people within your organisation and other key stakeholders in managing customer service

P2. Establish clear and measurable standards of customer service, taking into account customers' expectations, your organisation's resources and any legal or regulatory requirements

**E2. Ensure people and resources deliver customer service quality**

P3. Organise people and other resources to meet customer service standards, taking account of varying levels of demand and likely contingencies

P4. Ensure people delivering customer service are competent to carry out their duties, and provide them with any necessary training, support and supervision

P5. Ensure people understand the standards of customer service they are expected to deliver and the extent of their autonomy in responding to customers' requests and problems

**E3. Handle customer service requests and problems**

P6. Take responsibility for dealing with customers' requests and problems referred to you, seeking advice from specialists and/or more senior managers, where necessary

P7. Ensure customers are kept informed about the actions you are taking to deal with their requests or problems

**E4. Enhance the quality of customer service**

P8. Encourage staff and customers to provide feedback on their perceptions of the standards of customer service

P9. Continuously monitor the standards of customer service delivered, customers' requests and problems and feedback from staff and customers

P10. Analyse customer service data to identify the causes of problems and opportunities for improving customer service

P11. Make or recommend changes to processes, systems or standards order to improve customer service

## KNOWLEDGE REQUIREMENTS

K1. Explain how you engage people within your organisation and other stakeholders in managing customer service

K2. Describe how to establish clear and measurable standards of customer service, taking into account customers' expectations and your organisation's resources

K3. Explain how to organise staffing and other resources to meet customer service standards, and the importance of taking account of varying levels of demand and likely contingencies

K4. Review how to identify likely contingencies when organising staffing and other resources

K5. Explain how to identify sustainable resources and ensure their effective use when organising the delivery of customer service

K6. Explain the importance of ensuring customer service staff are competent to carry out their duties, and providing them with any necessary support, and how to do so

K7. Explain the importance of ensuring staff understands the standards of customer service they are expected to deliver and the extent of their autonomy in responding to customers' requests and problems

K8. Explain the importance of taking responsibility for dealing with customers' requests and problems referred to you

K9. Explain the importance of keeping customers informed about the actions you are taking to deal with their requests or problems

K10. Describe how to identify and manage potential issues before they develop into problems

K11. Describe how you normally deal with customers' requests and/or problems

K12. Explain the importance of encouraging staff and customers to provide feedback on their perceptions of the standards of customer service

K13. Explain how to monitor the standards of customer service delivered customers' requests and problems and feedback from staff and customers, and the importance of doing so continuously

K14. Review the types of customer service data available and how to analyse such data to identify the causes of problems and opportunities for improving customer service

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Communicate quality customer service standards may include:**
- Meetings to discuss managing customer service
- Briefings to staff
- Discussion about customer service issues

**2. Ensuring people and resources are available to deliver customer service quality may include:**
- Planning and forecasting human resources
- Planning and forecasting customer seasonal demands or other variables
- Budgeting for other resources

**3. Research may include:**
- Interviewing colleagues and clients
- Focus groups
- Data analysis
- Product sampling
- Sales data review
- Others

**4. Customer service data may include:**
- Data sampling
- Statistical analysis
- Comparison between current and previous research

**5. Service levels may relate to:**
- Service quality
- Customer satisfaction
- Staff attitude
- Appearance of venue, staff, etc.
- Atmosphere of venue
- Responsiveness of staff to customer requests
- Delivery times
- Prices/costs
- Product/service availability
- Courtesy/politeness
- Others

**6. Customers' needs may relate to:**
- Advice or general information
- Specific information
- Complaints
- Purchasing organisation's products and services
- Returning organisation's products and services
- Accuracy of information
- Fairness/politeness
- Prices/value
- Others

**7. Appropriate methods to monitor customer/ guest satisfaction may include:**
- Mystery guest
- Customer satisfaction survey
- Customer/guest interviews
- Representative sampling activities
- Industry benchmarking
- Web-based comments
- Face to face comments
- Others

**8. Evaluate and report on customer service may relate to:**
- Service quality evaluations
- Customer satisfaction evaluations
- Industry benchmarking

**Important behaviours for supervisors/ managers include:**
1. Respond promptly to crises and problems with a proposed course of action
2. Seek opportunities to improve performance
3. Encourage others to take decisions autonomously, when appropriate
4. Demonstrate a clear understanding of different customers and their real and perceived needs
5. Empower staff to solve customer problems within clear limits of authority
6. Take personal responsibility for resolving customer problems referred to you by other staff
7. Recognise recurring problems and promote changes to structures, systems and processes to resolve these
8. Encourage and welcome feedback from others and use this feedback constructively
9. Prioritise objectives and plan work to make the effective use of time and resources
10. Take personal responsibility for making things happen
11. Clearly agree what is expected of others and hold them to account
12. Honour your commitments to others
13. Identify the implications or consequences of a situation
14. Take timely decisions that are realistic for the situation

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc. | **Suitable methods will include:** |

**ASSESSMENT GUIDE**

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

This unit may be assessed holistically by means of a portfolio of evidence or report managing quality in customer/guest services in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**

1. Two examples or cases of how you engage people within your organisation and other key stakeholders in managing customer service and establishing clear and measurable standards of customer service

2. Two examples of how you organise people and other resources to meet customer service standards, and ensure people delivering customer service are competent to carry out their duties and understand the standards of customer service they are expected to deliver

3. Two examples of how you have taken responsibility for dealing with customers' requests and problems referred to you and ensured customers were kept informed about the actions you were taking to deal with their requests or problems

4. Two examples of how you continuously monitor the standards of customer service delivered, customers' requests and problems and feedback from staff and customers and make or recommend changes to processes, systems or standards order to improve customer service

5. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions

**ASSESSMENT METHODS**

**Suitable methods will include:**
- Customer service data
- Personal statements (reflections on the process and reasoning behind quality service activities)
- Witness statements (comments on the quality customer service practices)
- Notes, reports, recommendations to managers of customer service problems or critical incidents
- Notes, emails, memos or other records of customer service improvements
- Personal statement (reflections on your own role in dealing with customer service challenges)

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff with supervisory or management responsibility in tourism occupations | D1.HRM.CL9.06 |

# CMS3. UNIT TITLE: ORGANISE FUNCTIONS

## UNIT DESCRIPTOR

This unit covers the competencies required for organizing a hospitality function

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Prepare for the function**

P1. Gather information about the function, customer requirements and responsibilities

P2. Brief colleagues and staff about the function and their responsibilities

**E2. Supervise the the function**

P3. Oversee all service flows

P4. Liaise with colleagues, staff and customers throughout the function

P5. Ensure that the arrangements meet all organisational and legal requirements

P6. Take appropriate action(s) to deal with any problems that may arise during the function

**E3. Close down the function**

P7. Oversee closing down and clearing up after the function finishes

P8. De-brief colleagues and staff after the function and evaluate how to make improvements

P9. Receive and collate feedback from all those involved in the function

P10. Complete all necessary records and forms relating to the function

### KNOWLEDGE REQUIREMENTS

K1. Describe the organisation customer care policies are and how these relate to functions.

K2. List the organisation record keeping policies in relation to functions

K3. Explain how to obtain the customer specific requirements for the function, e. g. food, drink, special diets, table plan, entertainment

K4. Describe the food and drinks available to support the function

K5. State who is responsible for ordering/organising the deliveries

K6. List the equipment, facilities and capacity the venue to support the function

K7. State who is responsible for allocation of staff and tasks

K8. State who is responsible for briefing staff in relation to their responsibilities

K9. Describe the Health & Safety/legal requirements that will affect the function and how this is to be communicated to all

K10. Explain why it is important for clear and transparent communication channels in relation to the function

K11. Explain the importance of anticipated any problems/challenges that may occur, prior, during and after the function

K12. Explain how to inspect the venue prior and during the preparations to ensure that all is in order in relation to customer/organisation requirements

K13. Explain how to effectively monitor the function at critical points

K14. Explain how to liaise with key individuals effectively during the function

K15. Describe the techniques to be adopted to clear function venues effectively

K16. Explain how to carry-out post function inspection(s) on equipment and facilities

K17. State who is responsible for reporting damage/loss and the storage of equipment after the function

K18. Describe the organisational/legal requirements are for clearing the venue after the function

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Type of functions:**
- Single functions
- Multi functions - occurring at the same time
- Outdoor functions

**2. People involved include:**
- Staff and colleagues
- Managers
- Customers
- Internal departments
- Other organisations

**3. Problem solving for functions could include:**
- Equipment failure
- Power failure
- Staff availability
- Commodities and supplies
- Customer problems
- Unexpected changes in demand
- Others

## ASSESSMENT GUIDE

**Performance evidence should include:**
1. At least two documented records of preparation and planning of functions
2. At least two functions successfully delivered
3. At least two problems resolved during a function(s)
4. At least two functions evaluated and reviewed with full documentation and feedback forms

## ASSESSMENT METHODS

**A variety of assessment methods can be used including:**
- Portfolio of workplace evidence
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

## RELEVANT OCCUPATIONS

Event Manager, F&B Manager, Banquet Sales Manager; Sale Manager

## ACCSTP REF

D1.HML.CL10.08

# GAS6. UNIT TITLE: MANAGE DAILY OPERATIONS

## UNIT DESCRIPTOR

This unit covers the competencies required to perform daily operations in a hotel, tourism or travel organisation.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Inspect key areas and equipment**
P1. Ensure main areas are clean and ready for use
P2. Ensure all equipment and materials are in place

**E2. Perform daily requisition procedures**
P3. Review all stocks and supplies
P4. Ensure requisition orders are completed
P5. Make purchase requests

**E3. Review schedules**
P6. Ensure staffing schedules are up to date
P7. Check schedules for any issues
P8. Input data and backup

**E4. Monitor perfor**mance standards
P9. Review daily reports
P10. Interpret data
P11. Diagnose problems

**E5. Monitor productivity standards**
P12. Review customer feedback
P13. Review financial reports

**E6. Maintain the security of premises and personnel**
P14. Ensure security records are maintained
P15. Ensure personnel records are up to date
P16. Review security and safety reports

### KNOWLEDGE REQUIREMENTS

K1. Explain your method for carrying out daily inspection to key areas and equipment
K2. Describe the daily requisitions procedure
K3. Explain how you use guest's comments for quality improvement

K4. Describe the organisations' security arrangements for the premises and personnel
K5. Explain how performance and productivity data is used for planning and improvement

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Inspection of key areas could include:**
  • Restaurant, bar premises and bar equipment
  • Floral displays
  • Food and beverage promotional displays
  • Lighting
  • Windows, mirrors and polished surfaces
  • Station cleanliness
  • Ventilation
  • Cellars
  • Kitchens and stewarding
  • Stores, pantry and room service
  • C&B Stores
  • Waste areas
  • Staff locker and wash rooms
  • Fire escapes and stair wells
  • Service elevators
  • Others

**2. Daily requisition would include:**
  • Linen
  • Chemical
  • Stationery
  • Operating supplies
  • Food & beverage items

**3. Schedules would include:**
  • Duty manager schedule
  • Manager on Duty
  • Patrolling security
  • Staffing schedule

**4. Performance standards would include:**
  • Preparing financial reports
  • Calculating averages, ratios and percentages
  • Interpreting specific results
  • Identifying the difference between reports
  • Diagnosing probable causes
  • Calculating and monitoring a RevPAR

## CONDITIONS OF PERFORMANCE AND VARIABLES

**5. Productivity standards could include:**
- Quality control manual
- Customer feedback
- On-line reviews
- Staff feedback

**6. Maintain the security of premises and personnel could include:**
- Protecting database and documents
- Human resource records and headcount
- Ensuring access to premises
- Ensuring fire protection system is in good condition

**Important behaviours for supervisors/ managers include:**
1. Constructively challenge the status quo and seek better alternatives
2. Present information clearly, concisely, accurately and in ways that promote understanding
3. Give feedback to others to help them maintain and improve their performance
4. Continuously improve products and services
5. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. Monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
7. Develop systems to gather and manage information and knowledge effectively, efficiently and ethically
8. Use a range of legitimate strategies and tactics to influence people
9. Make effective use of available resources
10. Recognise stakeholders' needs and interests and manage these effectively
11. Build a plausible picture from limited data
12. Specify the assumptions made and risks involved in understanding a situation

## ASSESSMENT GUIDE

**Performance assessment must include:**
1. At least two requisition records and purchase orders
2. At least one security report
3. At least one customer feedback questionnaire and/or survey analysis
4. At least two completed inspection checklists
5. At least two staffing schedules
6. At least two financial reports

## ASSESSMENT METHODS

**Suitable assessment methods may include:**
- Direct observation
- Written or oral questioning to assess aspects of specialised knowledge
- Naturally occurring evidence in the workplace
- Review of portfolios of evidence
- Review of third party workplace reports of on the job performance by the individual

## RELEVANT OCCUPATIONS

Head of Department, Manager, Manager on Duty

## ACCSTP REF

D1.HRM.CL9.03

## RTS4.7. UNIT TITLE: APPLY RESPONSIBLE TOURISM TO FOOD AND BEVERAGE OPERATIONS

### UNIT DESCRIPTOR

This unit covers the competencies required to apply responsible tourism principles to food and beverage operations such as in restaurants, kitchens and food outlets.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Inform customers of responsible tourism issues**

P1.   Inform customers of restaurant environmental and water conservation policies

P2.   Inform guests of actions to save energy and manage waste in the kitchen and restaurant

**E2. Implement energy saving practices**

P3.   Ensure all equipment is cleaned and serviced regularly

P4.   Train staff to work efficiently and reduce energy usage

**E3. Implement water efficiency practices**

P5.   Place signage in restaurant and kitchen reminding staff to conserve water and report leaks

P6.   Train staff to ensure water saving in the most efficient manner

P7.   Present results of savings to staff to encourage them to continue to improved

**E4. Avoid waste in food and beverage operations**

P8.   Review recycling options in kitchens and restaurants

P9.   Monitor and measure waste and recycling levels

**E5. Apply responsible tourism principles in purchasing and supplies**

P10.  Establish a purchasing policy that favours environmentally-friendly products, and those that minimise energy, water and waste in the production process

P11.  Establish a purchasing policy that favours local suppliers if possible

### KNOWLEDGE REQUIREMENTS

K1.   Explain how to develop a company code of conduct for customers to follow in responsible tourism behaviour

K2.   Explain the methods used in your restaurant/ kitchen for saving energy, water and waste management

K3.   Explain the importance of adopting responsible tourism principles in food and beverage operations

K4.   Describe the procedures for energy consumption reduction in food and beverage operations

K5.   Describe the ways of saving water in food and beverage operations

K6.   Explain the ways of increasing the use of recycling in food and beverage operations

K7.   Define the significance of energy saving and minimizing waste

K8.   Explain how to raise awareness and build capacity of staff in sustainable tourism principles that relate to their day-to-day responsibilities

K9.   Describe how to set supplier sustainability targets for improvement

K10.  Explain how your restaurant or kitchen ensures energy and water saving and waste management in purchasing procedures

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Principles of responsible tourism include:**
- Use natural resources optimally
- Respect and conserve socio-cultural authenticity
- Ensure viable, long-term economic benefits to all stakeholders

**2. Energy saving practices could include:**
- Ensure all restaurant or kitchen equipment is cleaned and serviced regularly
- Arrange for staff to prepare food efficiently and in large batches if possible
- Encourage reduction of equipment standby and pre-heating time
- Instruct kitchen staff to thaw food in the refrigerator overnight rather than using running water or microwaves

**3. Water efficiency in food and beverage operations could include:**
- Instruct staff to sweep or mop kitchen floors instead of using a hose
- Train staff to operate the dishwasher in the most efficient manner

**4. Avoid waste in food and beverage operations could include:**
- Implement recycling in kitchen and restaurant
- Arrange for separate and distinctive bins for food wastes, general wastes and recyclables
- Monitor your food waste and adjust inventory to minimise waste due to spoilage
- Develop daily production plans to minimise over-prepaping food that will then be wasted
- Arrange compost for food waste rather than sending it to the trash bin
- Offer customers environmentally friendly take-away containers for leftover food
- Instruct kitchen staff to collect cooking oils and fats for re-processing and reuse
- Discuss with chef about food portion sizes and how to adjust to avoid excessive food wastes
- Monitor and measure waste and recycling levels

**5. Establish a responsible food and beverage purchasing policy and practice that includes:**
- Buy in bulk and in concentrated form, such as beer and soft drinks on tap rather than cans and bottles
- Purchase recycled content and recyclable takeaway containers, cups, utensils and serviettes
- Purchase disposable utensils that minimise excess packaging, such as avoid individually wrapped items
- Establish a purchasing policy that favours environmentally-friendly products
- Purchase products that minimise energy, water and waste in the production process

**Important behaviours for supervisors/managers include:**
1. Encourage, generate and recognise innovative solutions
2. Constructively challenge the status quo and seek better alternatives
3. Try out new ways of working
4. Keep people informed of plans and developments in a timely way
5. Balance the diverse needs of different customers
6. Continuously improve products and services
7. Take repeated or different actions to overcome obstacles
8. Identify and raise ethical concerns
9. Take personal responsibility for making things happen
10. Monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
11. Communicate a vision that inspires enthusiasm and commitment
12. Communicate clearly the value and benefits of a proposed course of action
13. Present ideas and arguments convincingly in ways that engage people

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.<br><br>This Unit may be assessed holistically by means of a portfolio of evidence or report on implementing responsible tourism principles in a hotel environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.<br><br>**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**<br><br>1. At least two occasions in your restaurant that inform customers about responsible tourism issues recorded and documented<br>2. At least three examples of energy saving, water efficiency and waste avoidance activities recorded and documented<br>3. One example of responsible tourism principles applied to kitchen/restaurant purchasing and supplies<br>4. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions. | **Suitable methods will include:**<br>• Portfolio of workplace evidence<br>• Personal statements<br>• Witness testimony<br>• Professional discussion<br><br>Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.<br><br>A portfolio or written report should be supplemented by oral questions to ensure all aspects of the Evidence requirements are fully met. |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Managers/Supervisors in kitchens, restaurants and other food outlets | N/A |

# HRS2. UNIT TITLE: PLAN THE WORKFORCE

## UNIT DESCRIPTOR

This unit covers the competencies required to take a lead in identifying the workforce requirements of your department and how these will be satisfied. This standard is not intended for human resources specialists. It is relevant to managers who are responsible for planning the workforce across their department or their team.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Evaluate your future staffing needs**

P1. Engage appropriate people within your organisation and other key stakeholders in planning workforce requirements

P2. Seek and make use of HR resources to assist in workforce planning activities, where necessary

P3. Evaluate your organisation's strategic objectives and plans to obtain information needed for workforce planning purposes and identify any key issues for further consideration

**E2. Review and identify the competences required**

P4. Identify the knowledge, skills and competence required to deliver your organisation's strategic objectives and plans

P5. Review the capacity and capability of the current workforce to meet identified knowledge, skills and competence requirements

P6. Identify any learning or development needs of the current workforce to meet requirements

P7. Make sure that the diversity of the workforce provides a suitable mix of people to achieve its objectives

**E3. Develop workforce and contingency plans**

P8. Develop workforce plans that meet the organisation's long, medium, and short-term requirements, making effective use of people from inside and from outside the organisation

P9. Ensure employment contracts are appropriate to the needs of the organisation

P10. Make sure that resources needed to recruit, develop, retain and redeploy people are available

P11. Develop contingency plans to deal with unforeseen circumstances and maintain business continuity

P12. Identify any recurring issues that cause people to leave your organisation and seek to address these

**E4. Communicate and review workforce plans**

P13. Communicate workforce plans to relevant people

P14. Review your workforce plans periodically and in the light of changes to your organisation's strategic objectives and plans

### KNOWLEDGE REQUIREMENTS

K1. Explain how to engage employees and other stakeholders in workforce planning

K2. Describe what an effective workforce plan should cover

K3. Identify the information required to undertake workforce planning

K4. Identify the legislation and requirements relating to employment, workers' welfare and rights, equality and health and safety

K5. Explain how to take account of equality, diversity and inclusion issues in workforce planning

K6. Describe the strategies and/or services which need to be in place for when people leave, including redundancy counselling

K7. Explain the importance of putting contingency plans in place and how to do so effectively

K8. Describe the different ways in which workforce requirements can be met, their advantages and disadvantages, costs and benefits

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Evaluate your future staffing needs could include review of:**
- Staff appraisals
- Job descriptions
- Training audits
- Identified training needs
- Skills shortages

**2. Review and identify the competences required could include:**
- Identify the knowledge, skills and competence required
- Review the capacity and capability of the current workforce
- Identify any learning or development needs

**3. Workforce and contingency plans can include:**
- Succession planning
- Adjusting to new business challenges

**4. Communicate and review workforce plans**
- Initial discussions with key stakeholders
- Regular updates on manpower planning

**Important behaviours for supervisors/ managers include:**
1. Seize opportunities presented by the diversity of people
2. Identify people's preferred ways of communicating
3. Use communication media and styles appropriate to different people and situations
4. Comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
5. Watch out for potential risks and hazards
6. Make effective use of existing sources of information
7. Identify systemic issues and seek to mitigate their impact on performance
8. Anticipate likely future scenarios based on realistic analysis of trends and developments
9. Work towards a clearly defined vision of the future
10. Take decisions in uncertain situations or based on incomplete information when necessary
11. Take and implement difficult and/or unpopular decisions, where necessary

## ASSESSMENT GUIDE

This Unit may be assessed holistically by means of a portfolio of evidence or report on aspects of managing discipline in a hospitality or tourism environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/ managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.

**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation.**

1. Two examples/cases/reports of how you evaluated your future staffing needs and reviewed and identified the competences required
2. Two examples of workforce planning and contingency plans to address future business needs and challenges
3. Two reports/examples of how you communicated workforce plans to relevant people

## ASSESSMENT METHODS

Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.

**Suitable methods will include:**
- Portfolio of workplace evidence to include notes of meetings, notes of discussion with individuals and colleagues, details of support and advice provided to individuals, record of feedback etc. (without named individuals)
- Observation
- Personal statements
- Witness testimony
- Professional discussion

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

**Assessing knowledge and understanding:**

Knowledge and understanding are key components of competent performance. Where knowledge and understanding (and the handling of contingency situations) is not apparent from performance evidence, it must be assessed by other means and be supported by suitable evidence such as:

- Documented answers to oral questioning
- Written examination

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Department or Division Managers in tourism organisations | D1.HML.CL10.10 |

# GAS3. UNIT TITLE: ESTABLISH POLICIES AND PROCEDURES

## UNIT DESCRIPTOR

This unit covers the competencies required to establish policies and procedures relating to legal, regulatory, ethical and social requirements, and to communicate these policies and procedures to relevant people.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Develop operational policies**

P1. Develop operational polices and strategies based on monitoring of workplace needs and identification of opportunities for improvement and innovation

P2. Develop scope and objectives of the required initiative based on enterprise goals, staff and customer feedback

P3. Identify and analyse internal and external factors that may impact on the policy

P4. Consult appropriate stakeholders during the development of the policy

P5. Develop appropriate and financially-sound resource strategies

P6. Develop administrative framework and systems capable of supporting the planned initiative

P7. Identify and communicate clearly all priorities, responsibilities and timelines

P8. Develop evaluation systems in consultation with appropriate colleagues

**E2. Administer and monitor operational policy**

P9. Implement and evaluate identified actions in accordance with agreed priorities

P10. Monitor performance indicators

P11. Provide progress and other reports as required

P12. Make assessment of the need for additional resource requirements and take appropriate action

**E3. Conduct on-going evaluation**

P13. Review the operational policy to assess effectiveness in the workplace

P14. Monitor performance

P15. Identify problems and make adjustments accordingly

P16. Incorporate the results of evaluation into on-going planning

### KNOWLEDGE REQUIREMENTS

K1. Explain the key planning concepts and techniques including the structure of operational polices and steps in the planning process

K2. Explain how to develop operational polices and strategies based on monitoring of workplace needs

K3. Identify some of the internal and external factors that may impact on the policy

K4. Explain the factors in developing appropriate and financially-sound resource strategies

K5. Describe the administrative framework and systems capable of supporting the planned initiative

K6. Describe the best channels to communicate priorities, responsibilities and timelines

K7. Describe the progress and other reports used for monitoring policy implementation

K8. Explain how the operational policy is evaluated to assess effectiveness in the workplace

K9. Explain how you would incorporate the results of evaluation into on-going planning

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Policies requiring development could include:**
- Environment
- Products and services
- Training
- Workplace relations
- Finance
- Asset management
- Others

**2. Strategies may include:**
- Client development
- Geographic expansion
- Organisational growth
- Service growth
- Debt reduction
- Income development
- Others

**3. Objectives may include:**
- Sales figures
- Revenues
- Delivery times
- Service standards
- Client numbers
- Sales figures and targets
- Booking levels
- Customer or staff feedback
- Productivity gains
- Guest satisfaction

**4. Analyse internal and external factors may relate to:**
- Capabilities and resources
- Trends and developments in the marketplace
- Comparative market information
- Legal and ethical constraints

**5. Stakeholders may include:**
- Customers
- Employees
- Government agencies
- Owners
- Suppliers
- Strategic alliance partners

**6. Evaluate may include:**
- Key performance indicators
- Gap analysis
- Customer feedback
- Compliance reports
- Employee feedback

**7. Performance indicators may include:**
- Sales
- Return on investment
- Customer service
- Debt servicing costs

**8. Review the operational plan may relate to:**
- Quarterly reviews
- Business plan cycle
- Major events triggering a review, e.g. change in market-place

**9. Performance may relate to:**
- Market share
- Sales figures
- Customer satisfaction
- Staff retention

**Important behaviours for supervisors/ managers include:**
1. Seek opportunities to improve performance
2. Constructively challenge the status quo and seek better alternatives
3. Try out new ways of working
4. Present information clearly, concisely, accurately and in ways that promote understanding
5. Reflect on your experiences and use the lessons to guide your decisions and actions
6. Balance risks against the benefits that may arise from taking risks
7. Take personal responsibility for making things happen
8. Create a sense of common purpose
9. Anticipate likely future scenarios based on realistic analysis of trends and developments
10. Specify the assumptions made and risks involved in understanding a situation
11. Take timely decisions that are realistic for the situation

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Assessment of units at level 3-5 is normally based on performance at work. Some units at levels 3-5 cannot be assessed by observation due to confidentiality, work constraints/environment etc.<br><br>This unit may be assessed holistically by means of a portfolio of evidence or report on planning and implementing responsible tourism policies and procedures in a hotel environment. Individuals are expected to demonstrate that they can apply relevant concepts to situations which they could face as supervisors/managers. They are also expected to suggest, justify and evaluate possible courses of actions which they may take to deal with situations and with challenges that they face as supervisors/managers in an organisation.<br><br>**Note that all evidence should remove names of personnel to protect the privacy of individuals and the organisation. Evidence must include:**<br><br>1. Example of at least two operational policies/strategies developed based on monitoring of workplace needs and identification of opportunities for improvement and innovation<br>2. Example of one operational policy implemented and evaluated in accordance with agreed priorities and performance indicators<br>3. Example of one operational policy monitored for performance, adjusted and incorporating the results of evaluation into on-going planning<br>4. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions | **Suitable methods will include:**<br>• Portfolio of workplace evidence (This could be minutes or notes of meetings, reports or recommendations from others)<br>• Personal statements<br>• Witness testimony<br>• Professional discussion<br><br>Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.<br><br>A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met. |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Managers in tourism occupations | D1.HGA.CL6.01 |

# COS1. UNIT TITLE: USE THE TELEPHONE IN THE WORKPLACE

## UNIT DESCRIPTOR

This unit describes the competencies required to use the phone in the workplace. It includes preparation to answer the phone effectively to handle all telephone situations.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Communicate effectively on the telephone**
P1. Prepare to answer the phone
P2. Ensure the appropriate greeting style is applied
P3. Speak clearly and slowly

**E2. Initiate a telephone call**
P4. Prepare content for telephone conversation
P5. Dial the number correctly
P6. End the call courteously

**E3. Transfer a call**
P7. Check if the transfer request is allowed or not
P8. Inform the caller that the call will be transferred if applicable
P9. Connect with a third party
P10. Ensure the call is transferred promptly

**E4. Place a call on hold**
P11. Inform the caller of the call status
P12. Offer alternative contacts if the called party is engaged

**E5. Take a message**
P13. Check if the caller wants to leave a message or voice mail message
P14. Complete the message form after reconfirming all the details with the caller
P15. Pass the message to the person concerned

### KNOWLEDGE REQUIREMENTS

K1. List things that need to be ready for an effective telephone communication
K2. State the property's greeting standard
K3. Explain the importance of speaking clearly and slowly
K4. Identify the information needed to prepare for the call

K5. Describe how to end the call courteously
K6. Explain how the call could be transferred
K7. Explain how the call could be placed on hold
K8. Identify what information is needed to complete a message form

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Communicate effectively on the telephone includes:**
· Using a telephone/switch board/headphone sets
· Greeting standards

**2. Initiate a telephone call requires:**
· Paper/note pad
· Pen
· Telephone directory
· Telephone number
· Conversation content

**3. Transfer a call requires:**
· Extension number list
· Telephone directory

**4. Take a call message requires:**
· Message form
· In-house guest/expected arrival list
· Message envelope

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| 1. At least four telephone calls should be observed and monitored to ensure the standard is met<br>2. Assessment should ensure the property's standards and procedures in using the phone in the workplace are followed | · Observation of practical candidate performance<br>· Oral test, written questions and/or multiple choice test<br>· Third party reports completed by a supervisor<br>· Role play |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage, Waiter/Waitress, Receptionist/ Front Desk Agent, Guest Service Agent, Housekeeping Attendant, Kitchen, Security, Engineer, Tour Operator | D1.HRS.CL1.04 & D1.HOT.CL1.07 |

# COS2. UNIT TITLE: WORK EFFECTIVELY WITH OTHERS

## UNIT DESCRIPTOR

This unit describes the competencies required to work in a hospitality or tourism environment promoting department/team commitment and cooperation, supporting team members and dealing effectively with issues, problems and conflict.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Develop effective workplace relationships**

P1. Identify own responsibilities and duties in relation to department/team members

P2. Undertake activities in a manner that promotes cooperation and good relationships

P3. Encourage, acknowledge and act upon feedback provided by others in the department/team

**E2. Contribute to department or team activities**

P4. Provide support to department or team members to ensure goals are met

P5. Contribute to department/team goals and tasks according to organisational requirements

P6. Share information relevant to work with department/team to ensure designated goals are met

**E3. Deal effectively with issues, problems and conflict**

P7. Respect differences in personal values and beliefs and their importance in the development of relationships

P8. Identify any linguistic and cultural differences in communication styles and respond appropriately

P9. Identify issues, problems and conflict encountered in the workplace

P10. Seek assistance from department/team members when issues, problems and conflict arise

### KNOWLEDGE REQUIREMENTS

K1. List own responsibilities and duties in relation to department/team members

K2. Explain how to undertake activities in a manner that promotes cooperation and good relationships

K3. Explain how to act upon feedback provided by others in the department/team

K4. Give examples of how to contribute to department or team activities

K5. Describe how to support department or team members to ensure goals are met

K6. Suggest ways to share information relevant to work with department/team to ensure designated goals are met

K7. Explain how to deal effectively with issues, problems and conflict

K8. Explain how to respect differences in personal values and beliefs

K9. Explain how to respond to linguistic and cultural differences in communication styles

K10. List the type of issues, problems and conflict encountered in the workplace

K11. Explain how to get assistance from department/team members when issues, problems and conflict arise

## CONDITIONS OF PERFORMANCE AND VARIABLES

The unit variables interpret the scope and context of this unit of competence, allowing for differences between different working environments and is appropriate for all tourism and hospitality job roles.

1. **Responsibilities and duties may include:**
   - Code of conduct
   - Job description and employment arrangements
   - Skills, training and competencies
   - Supervision and accountability
   - Responsible and sustainable working practices

2. **Department/team members may include:**
   - Peers/work colleagues/team/trainees/intern
   - Supervisor or manager

3. **Feedback on performance may include:**
   - Formal/informal performance appraisals
   - Feedback from supervisors and colleagues
   - Personal, reflective behaviour strategies

4. **Support to team members may include:**
   - Explaining/clarifying
   - Helping colleagues
   - Problem solving
   - Providing encouragement
   - Providing feedback to a team member
   - Undertaking extra tasks if necessary

5. **Information to be shared may include:**
   - Acknowledging satisfactory performance
   - Acknowledging unsatisfactory performance
   - Assisting a colleague
   - Clarifying the organisation's preferred task completion methods
   - Encouraging colleagues
   - Open communication channels
   - Workplace hazards, risks and controls

6. **Opportunities for improvement may include:**
   - Career planning/development
   - Coaching, mentoring and/or supervision
   - Formal/informal learning programmes
   - Internal/external training provision
   - Performance appraisals
   - Personal study
   - Recognition of prior learning/experience

## ASSESSMENT GUIDE

**Evidence of the following is required:**

1. Two examples of providing support to team members to ensure goals are met
2. Two examples of seeking feedback from clients and/or colleagues and taking appropriate action
3. Two examples/cases of resolving conflicts in the workplace

**Assessment must ensure:**
- Access to an actual workplace or simulated environment
- Access to office equipment and resources
- Examples of problems, issues or conflicts that have been resolved

## ASSESSMENT METHODS

**A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:**

- Direct questioning combined with review of portfolios of evidence and third party workplace reports of on the job performance by the candidate
- Analysis of responses to case studies and scenarios
- Demonstration of techniques
- Observation of demonstrated techniques in resolving conflict
- Observation of presentations
- Review of documentation identifying and planning strategies/opportunities for work-group improvement

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Appropriate for all tourism job roles | (1) D1.HOT.CL1.02; (2) D1.HOT.CL1.11; (3) D1.HOT.CL1.01 |

# COS3. UNIT TITLE: COMPLETE ROUTINE ADMINISTRATIVE TASKS

## UNIT DESCRIPTOR

This unit covers the competencies required to perform routine clerical and administrative tasks in a hospitality or tourism business.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Prepare business documents**

P1. Prepare and process documents with appropriate office equipment in accordance with organisational procedures and within designated timelines

P2. Draft basic communications using appropriate office equipment

**E2. Read and respond to different business documents**

P3. Receive, clarify and assess requirements of instructions and/or directions in accordance with organisational policies and procedures

P4. Read and interpret relevant details from instructions, directions and/or diagrams for application to particular jobs

P5. Comply with directions or instructions within designated timelines

**E3. Maintain information and filing systems**

P6. Maintain information and filing systems in accordance with organisational requirements

P7. Update reference and index systems in accordance with organisational requirements

P8. Retrieve files in response to information requests

P9. Follow security and confidentiality procedures

### KNOWLEDGE REQUIREMENTS

K1. Explain how to prepare and process different types of documents using different equipment

K2. Describe the range of communication methods used in your work environment

K3. List the organisational procedures used for different business documents

K4. Describe the types of instructions, directions and/or diagrams used in your workplace

K5. List the information and filing systems used in your organisation

K6. List the reference and index systems used in your organisation

K7. Describe the file retrieval system used in your organisation

K8. Describe your organisation's security and confidentiality procedures

## CONDITIONS OF PERFORMANCE AND VARIABLES

The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between different hospitality and tourism organisation.

1. **Documents may include:**
   - Mail, such as incoming and outgoing correspondence, guest mail and courier
   - Files, such as customer records, correspondence, financial records, receipts, invoices and orders
   - Correspondence, such as letters, facsimiles, memos and reports and others
   - Menus

2. **Office equipment may include:**
   - Computer
   - Photocopier
   - Facsimile
   - Printer or scanner
   - Others

3. **Procedures may relate to:**
   - Hazard policies and procedures
   - Emergency, fire and accident procedures
   - Personal safety procedures
   - Use of motor vehicles
   - Job procedures and work instructions

4. **Instructions, directions and/or diagrams may include:**
   - Work instructions
   - Directions on how to use equipment safely
   - Directions on how to complete a task safely
   - Diagrams that show safe working procedures
   - Policies and procedures
   - Manuals

5. **Information/documentation may include:**
   - Workplace procedures, checklists and instructions
   - Goods identification numbers and codes
   - Manufacturer's specifications
   - Workplace policies
   - Supplier and/or client instructions
   - Legislation, regulations and related documentation
   - Emergency procedures
   - Others

6. **Instructions and/or directions may relate to:**
   - Letters
   - Memos
   - Faxes
   - Emails
   - Invoices and purchase orders
   - Policies and procedures
   - Manuals
   - Others

7. **Information may include:**
   - Correspondence, such as faxes, memos, letters, email and other documents
   - Computer databases, customer records
   - Sales records, including monthly forecasts, targets achieved
   - Forms, including insurance forms, membership forms
   - Invoices, such as from suppliers, to debtors
   - Personnel records, including personal details, salary rates
   - Information on training needs
   - Marketing reports/plans/budgets
   - Financial figures
   - Others

8. **Organisational requirements may include:**
   - Security and confidentiality requirements
   - Legal and organisational policy/guidelines and requirements
   - Management and accountability channels
   - Others

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Performance assessment must include:**<br>1. Three examples of documents prepared and processed with appropriate office equipment in accordance with organisational procedures and within designated timelines<br>2. Three examples of processes that required following instructions and/or directions in accordance with organisational policies and procedures<br>3. Three examples of interpreting relevant details from instructions, directions and/or diagrams for application to particular jobs<br>4. Two examples of maintaining information and filing systems, retrieving files and archiving files in accordance with organisational requirements | **The following methods may be used to assess competency for this unit:**<br>・ Observation of practical candidate performance<br>・ Oral and written questions<br>・ Portfolio evidence<br>・ Third party reports completed by a supervisor |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Front Office Staff, Travel and Tour Operator Companies | D1.HOT.CL1.05 & 06;<br>D1.HGA.CL6. 03, 06, 07 & 12 |

# COS4. UNIT TITLE: USE ENGLISH AT A BASIC OPERATIONAL LEVEL

## UNIT DESCRIPTOR

This unit describes the competencies required to converse orally in English in the workplace at a basic operational level.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Make simple conversation**
P1. Respond to opening comments
P2. Comment on familiar topics
P3. Conclude a conversation

**E2. Respond to simple requests**
P4. Confirm understanding of instructions or requests
P5. Request clarification of instructions or requests

**E3. Make simple requests**
P6. Use polite forms to make simple requests
P7. Thank the person responding to your request

**E4. Express preferences**
P8. Talk about likes and dislikes
P9. Discuss preferences and give reasons

---

### KNOWLEDGE REQUIREMENTS

K1. Respond to opening comments and make simple conversation
K2. Comment on familiar topics and conclude a conversation
K3. Make and respond to simple requests
K4. Confirm understanding and request clarification of instructions or requests

K5. Describe routine procedures and explain a sequence of routine job tasks
K6. Make suggestions on how to improve routine procedures or in communication with guests
K7. Express likes, dislikes and preferences and give preferences and reasons

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### CONDITIONS OF PERFORMANCE AND VARIABLES

This unit applies where conversing in English at a basic operational level is required within all divisions of the hospitality and tourism industry and includes all staff with guest contact.

1. **Opening comments may include:**
   - How are you? Did you have a good trip? How can I help you?
   - Others

2. **Familiar topics may include:**
   - Giving directions; providing advice on the best places to shop, eat, visit etc; providing advice about a customer's special needs; providing information; referring a customer complaint to a supervisor; safety & healthy related information
   - Others

3. **Closing remarks may include:**
   - I hope you enjoy your stay/tour; Goodbye and I hope we see you again soon; Thank you for staying here; Please enjoy your tour
   - Others

4. **Ways to seek clarification may include:**
   - Asking the person to repeat themselves, e.g. would you mind saying that again? Would you mind spelling it? Sorry I didn't catch that. Sorry I missed that, Can you go over that again? Can you say that again please?
   - Seeking clarification, e.g. Can you please confirm you want to check out tomorrow? Are you looking for an all-day or half-day tour?

5. **Polite forms used for making requests may include:**
   - Please can you provide your driving licence for the hired car? Would you mind waiting for five minutes while I deal with this guest?

6. **Avoiding jargon in conversations with guests:**
   - Your room rate is US$100 plus plus/net
   - We are pleased to offer you FOC breakfast

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## ASSESSMENT GUIDE

**Assessment should ensure that the person can communicate effectively in the following situations:**

1. Respond to opening comments and make simple conversation
2. Comment on familiar topics and conclude a conversation
3. Make and respond to simple requests
4. Confirm understanding and request clarification of instructions or requests
5. Describe routine procedures and explain a sequence of routine job tasks
6. Make suggestions on how to improve routine procedures
7. Express likes, dislikes and preferences and give preferences and reasons

## ASSESSMENT METHODS

Assessment must ensure actual or simulated workplace application of situations where people converse at a basic operational level with guests or customers or in a classroom environment where the person can demonstrate their ability to communicate in basic English

**The following methods may be used to assess competency for this unit:**

- Observation of practical candidate performance
- Interviews
- Role plays
- Oral and written questions

## RELEVANT OCCUPATIONS

All tourism occupations

## ACCSTP REF

D1.LAN.CL1.01

# COS5. UNIT TITLE: MAINTAIN INDUSTRY KNOWLEDGE

## UNIT DESCRIPTOR

This unit describes the competencies required to source, maintain and use hospitality and tourism industry knowledge in a range of settings in the workplace.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Source current information on the hospitality and tourism industry**

P1. Access sources of information on the hospitality and tourism industry relevant to job requirements

P2. Obtain information on the hospitality and tourism industry to assist effective work performance

**E2. Use industry information to inform best practice**

P3. Obtain and distribute information as required by customers or guests

P4. Conduct work activities in accordance with legal requirements and ethical standards

P5. Apply industry knowledge and information to the day-to-day operation of the hospitality or tourism business

### KNOWLEDGE REQUIREMENTS

K1. Identify sources of reliable information on the Internet and elsewhere to update industry knowledge

K2. Describe the different sectors of the hospitality and tourism industry and their inter relationships

K3. Explain the role and function of two of the following sectors: food and beverage, front office, food production/kitchen operations, housekeeping, travel agencies and tour operations/tour guiding

K4. Explain what is meant by quality and continuous improvement in hospitality and tourism and the role of individual staff members in maintaining quality services

K5. Provide examples of responsible tourism ncluding energy saving, waste minimization and recycling

K6. Describe two basic laws, regulations or guidelines that apply to the hospitality and tourism industries and effect how a staff member conducts his/her work

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1. This unit applies to maintaining hospitality and tourism industry knowledge and may include:**
- Hotel operations
- Travel and tour operations
- Tour guiding
- Event management
- Other tourism related industries such as transport, airlines and spa and leisure etc.

**2. Information may relate to:**
- Different sectors and relationships between travel and hospitality
- Environmental issues and requirements, including responsible and sustainable tourism
- Work ethic required to work in the industry
- Industry expectations of staff
- Quality assurance
- Guest service information such as itineraries, airline or road travel, local attractions etc.
- Information on local banks, hospitals, embassy and others

## CONDITIONS OF PERFORMANCE AND VARIABLES

**3. Sources of information may include:**
- Internet (check reliability)
- Media
- Tourism associations
- Industry associations
- Industry journals
- Information services
- Personal observation and experience
- Colleagues, supervisors and managers
- Industry contacts, mentors and advisors
- Others

**4. Other industries may include:**
- Entertainment
- Food production
- Wine production
- Recreation
- Meetings and events
- Retail
- Others

**5. Legal issues which impact on the industry include:**
- Consumer protection
- Duty of care
- Equal employment opportunity
- Anti-discrimination
- Workplace relations
- Child sex tourism

**6. Ethical issues impacting to the industry include:**
- Confidentiality
- Commission procedures
- Overbooking
- Pricing
- Tipping
- Gifts and services free of charge
- Product recommendations
- Others

## ASSESSMENT GUIDE

**This is a core unit that underpins effective performance in all other units; combined training and assessment may be appropriate:**

1. Evidence of ability to source various information from at least two sources
2. Evidence of ability to source at least three different types of information related to work performance
3. Evidence of obtaining and distributing three types of information as required by customers or guests
4. Two examples of conducting work activities in accordance with company legal requirements and ethical standards
5. Two examples of applying industry knowledge and information to the day-to-day operation of the hospitality or tourism business

## ASSESSMENT METHODS

**For the learner to reach the required standard there should be evidence performance gathered through observation, work evidence and questioning:**
- Observation of practical candidate performance
- Oral and written questions
- Third party reports completed by a supervisor
- Role play

## RELEVANT OCCUPATIONS

All occupational areas in tourism businesses

## ACCSTP REF

D1.HOT.CL1.08

# COS6. UNIT TITLE: PROVIDE BASIC FIRST AID

## UNIT DESCRIPTOR

This unit covers the competencies required to perform basic first aid in a range of settings within a hospitality and tourism environment.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Perform immediate lifesaving first aid pending the arrival of medical aid**

P1. Ensure casualty is comfortable before requesting medical aid

P2. Place unconscious casualty in stable side position and clear the airways to promote breathing in accordance with established first aid procedures

P3. Stem casualty with external bleeding by following standard first aid procedures

**E2. Apply basic first aid**

P4. Provide first aid using established first aid procedures and available resources and equipment

P5. Monitor casualty's condition and respond in accordance with accepted first aid principles

P6. Seek first aid assistance from others in a timely manner

P7. Record accidents and injuries in accordance with organisational procedures

**E3. Adapt first aid procedures for remote situations**

P8. Care for injured person in remote conditions until help arrives, including the monitoring of airway, breathing and heartbeat, the control of pain, hydration and the maintenance of body temperature.

P9. Correctly care for casualty with 'severe injuries' in a remote situation, including preparation for transport

**E4. Communicate details of the incident**

P10. Request appropriate medical assistance using the most relevant and appropriate communication mechanism

P11. Convey details of casualty's condition and first-aid management activities accurately to emergency services or other personnel

P12. Prepare reports to supervisors in a timely manner, presenting all relevant facts

### KNOWLEDGE REQUIREMENTS

K1. Describe first aid situations that may occur in the workplace and appropriate first aid action, treatments and solutions

K2. List relevant health legislation and procedures

K3. Explain the priorities of first aid care

K4. Explain first aid procedures for:
   a. Conducting an initial patient first aid assessment
   b. Managing injuries
   c. Carrying out resuscitation techniques
   d. Reporting on first aid situations and action taken

K5. Describe techniques for management and care of casualties in various first aid situations, including:
   a. Acute illness and/or injury
   b. Wounds and bleeding
   c. Burns
   d. Bone, joint and muscle injuries

K6. Explain causes of respiratory failure and breathing difficulty

K7. Describe the DRABC action plan for the identification and control of danger, loss of consciousness and response, loss of airway, breathing and circulation. RED: rest, elevate and direct pressure for bleeding cases

K8. List the symptoms and signs of the most common causes of unconsciousness:
   a. Poisoning, bites and stings
   b. Sprains and strains
   c. Fractures (simple, compound and complicated)
   d. Dislocated joints
   e. Head, neck and back injuries
   f. Severe internal bleeding
   g. Abdominal, pelvic and chest injuries
   h. Shock as a result of severe injury
   i. Angina pain, heart attack and heart failure
   j. Burns and associated shock

K9. Explain the safety precautions needed to prevent accidents, illness and injuries and infection in remote area situations

K10. Describe communication techniques related to the provision of first aid

## CONDITIONS OF PERFORMANCE AND VARIABLES

The unit variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between organisations and workplaces. It relates to the unit as a whole and facilitates holistic assessment.

This unit applies to performing basic first aid procedures within hotel and tourism businesses and may include: Front Office, Housekeeping, Food and Beverage Service, Food Preparation, Travel and Tour Operations, Tour Guiding, On-site Tour Guiding, Tourist Boat Services.

### 1. Physical hazards may include:
- Workplace hazards, e.g. machinery, vehicles, environment
- Hazards associated with managing casualty, such as being bitten, confused, casualty becomes violent
- Bodily fluids
- Risk of further injury to the casualty

### 2. Casualty's vital signs and physical condition are managed for:
- Response, i.e. conscious or unconscious
- Airways, i.e. blocked, likely to become blocked
- Breathing, e.g. regular, irregular, possible problem with lungs
- Circulation, e.g. pulse, heart-beat is strong/weak, or racing pulse
- Possible neck or back injury
- Shock
- Allergic reaction/s
- Bleeding

### 3. First aid management may include:
- Management of external bleeding and shock
- Management of minor wounds and infection control
- Management of venomous bites and stings/poisons/allergic reactions
- Management of fractures
- Management of head and spinal injuries
- Management of airways including asthma

### 4. First aid may include:
- Resuscitation techniques
- CPR (Cardio pulmonary resuscitation) technique
- Bleeding and wound care
- Burns and scalds care
- Infection control
- Bandaging/splinting

### 5. Seek first aid assistance may include:
- Obtaining co-worker support
- Obtaining support from first aider
- Requesting emergency services assistance
- Requesting medical assistance
- Following hotel policy (helping guest to buy medicine or offering medicine to guests)

### 6. Details may relate to:
- Casualties conditions
- Location
- Assistance provided
- Number of casualties
- Assistance required

## ASSESSMENT GUIDE

This unit will be difficult to assess by observation of work practices unless there are medical emergencies that the person is directly involved with in the workplace. Therefore the most likely method of assessment will be simulation in a controlled environment.

### Assessment should ensure:
1. Knowledge of company policies and procedures in regard to administering first aid
2. Knowledge of policies and procedures in regard to completing records of first aid
3. Ability to apply the basic principles of administering first aid in a simulated situation for 3 incidents
4. Ability to carry out necessary procedures to manage a life-threatening situation for 2 incidents
5. Demonstration of CPR and resuscitation techniques on one occasion

## ASSESSMENT METHODS

This unit may be assessed in a simulated situation in order to provide experience in applying the competencies:
- Assessment should include practical demonstration through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility
- Knowledge can be tested by oral or written questioning
- Role play

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All tourism staff working in a variety of businesses and occupational areas | D1.HOT.CL1.12 |

# COS7. UNIT TITLE: PROVIDE SAFETY AND SECURITY

## UNIT DESCRIPTOR

This unit covers the competencies required in being safe in the workplace and being responsible for the safety and security of yourself and others. It is about identifying hazards, minimising risks and contributing to the security of the workplace.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Minimise risks to people and property in the workplace**

P1. Follow agreed safety procedures to minimise risks to people and property

P2. Maintain the security of the workplace following agreed procedures

P3. Ensure your own safety and security and that of others in your immediate workplace

P4. Behave in a way that minimise the risks to yourself and others

**E2. Take action to deal with security and safety risks**

P5. Take appropriate action in the event of incidents involving the security and safety of self and others

P6. Take appropriate measures to ensure you can work safely with aggressive and difficult customers

P7. Take appropriate action in the event of identifying the risk of danger to individuals

**E3. Provide basic security services**

P8. Operate basic security equipment in a work place or other establishment

P9. Escort, carry and store valuable items

**E4. Recording and reporting hazards and incidents**

P10. Report potential hazards in the workplace to the appropriate person

P11. Report and record incidents following agreed procedures

---

### KNOWLEDGE REQUIREMENTS

K1. Explain why risks should be assessed and reported

K2. Describe what actions should be taken for different types of risks

K3. State your personal responsibility for maintaining safety and security of yourself and others in the workplace

K4. Describe the legal responsibilities of employers and employees in relation to health and safety in the workplace

K5. Describe your role in maintaining health, safety and security in your immediate workplace

K6. List the procedures to follow for different emergencies

K7. Describe the ways of identifying aggressive behaviours and actions to take to ensure own safety

K8. Explain how to identify hazards and report them

K9. List some ways of minimising risks in the workplace

K10. Explain how to operate basic security equipment in work place or other establishment

K11. Describe the process to escort, carry and store valuable items

K12. List the required reporting arrangements in the event of accidents and incidents

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **Safety procedures to minimise risks and provide security to people and property would include:**
   - Procedures issued by the organisation
   - Government occupational health and safety legislation

2. **Minimising risks to yourself and others would include:**
   - Ensuring safety of guests and customers
   - Ensuring you do not take unnecessary risks

3. **Incidents involving the security and safety of self and others could include:**
   - Fire
   - Bomb threats
   - Intruders
   - Theft
   - Weather
   - Food poisoning
   - Accidents
   - Others

4. **Appropriate measures to ensure you can work safely with aggressive and difficult customers may include:**
   - Trying to calm the customer
   - Avoiding confrontation and physical action
   - Calling for help from colleagues or security
   - Involving management

5. **Basic security equipment in  work place or other establishment may include:**
   - Walkie-talkie handsets
   - Security cameras
   - Key control
   - Security boxes
   - Others

6. **Escort, carry and store valuable items may include:**
   - Guest valuables
   - Valuable equipment such as computers and cameras
   - Staff personal property
   - Others

7. **Hazards may include:**
   - Lifting and pushing – e.g. handling heavy or awkward shaped objects
   - Slips, trips, falls – e.g. slipping on a wet floor or tripping on uneven surfaces
   - Hot surfaces and substances – e.g. hot plates, pans and splashes from hot oils or liquids
   - Cutting equipment – e.g. knives and electric meat slicers
   - Damaged furniture
   - Obstructions – e.g. doors, passageways and rooms
   - Chemicals or cleaning fluids

8. **Report and record incidents following agreed procedures may include:**
   - Incident report form
   - Shift report form
   - Official accident or personal injury record
   - Equipment damage form
   - Bomb threat report
   - Guest in-house report
   - The most updated duty roster

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Where actual incidents have taken place, been addressed and reported, evidence from workplace supervisors should be included. Otherwise, these competences will need to be assessed through simulation, role play and other activities due to the nature of the issues being assessed. | **Assessment for this unit may be either from actual workplace incident reports and supervisor witness statements. If this cannot be assessed in the workplace, then assessment would involve:** |

**Evidence should show the person is able to:**

1. Take appropriate measures with aggressive and difficult customers on two occasions
2. Operate basic security equipment in a work place or other establishment on one occasion
3. Escort, carry and store valuable items on one occasion
4. Record and report hazards and incidents on two occasions

**Have knowledge of:**

1. Agreed safety procedures to minimise risks to people and property
2. Know how to take action to deal with security and safety risks

**ASSESSMENT METHODS**

**Assessment for this unit may be either from actual workplace incident reports and supervisor witness statements. If this cannot be assessed in the workplace, then assessment would involve:**

- Simulation of emergency situations/role play
- Written test or oral questioning of the trainee to establish their understanding of the competences for this unit

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff in tourism occupations | D1.HSS.CL4.01 |

# COS8. UNIT TITLE: RESPOND TO EMERGENCIES

## UNIT DESCRIPTOR

This unit covers the competencies required to respond to fire, security threats and medical emergencies.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Assist with the local implementation of emergency procedures**

P1. Ensure customers are clear that you are fully aware of the main details of the emergency and your role to assist with it

P2. Ensure customers' morale and goodwill is maintained through the minimisation of any inconvenience

P3. Maintain an appropriate balance between the needs of individuals and the needs of the group as a whole

P4. Ensure all people affected by the emergency are kept up to date and offered re-assurance, when necessary

**E2. Respond to fire in the premises**

P5. Establish nature and location of alarm

P6. Contact emergency services and management as appropriate

P7. Sound the alarm and provide first response assistance

P8. Assist with evacuation of premises

P9. Ensure access and assistance to emergency services upon their arrival

**E3. Respond to security threats**

P10. Manage guests/customers who are displaying inappropriate behaviour

P11. Secure unsecured areas

P12. Respond to suspicious packages

P13. Respond to bomb threats

**E4. Respond to medical emergencies**

P14. Identify physical hazards and minimize risks to own and others' health and safety

P15. Assess casualty's vital signs and physical condition in accordance

P16. Apply basic first aid techniques in accordance with established first aid procedures and available resources and equipment

P17. Monitor casualty's condition and respond to the casualty's condition in accordance with accepted first aid principles

P18. Seek first aid assistance from others in a timely manner

### KNOWLEDGE REQUIREMENTS

K1. Describe steps to take in the event of any emergency

K2. List the particular tasks that staff may be expected to perform in the event of an evacuation

K3. Explain the different types of fire and which extinguisher class should be used on each

K4. List the steps to take on discovering a fire and fire hazards in the Front Office area

K5. List the steps to be taken on hearing an alarm

K6. Explain what are the objectives of first aid

K7. List the main types of injury that may be encountered in the work place

K8. Describe first aid procedures for a variety of emergency traumas and situations

K9. Describe in detail what steps should be taken for each of the types of injury

K10. Describe the procedure to adopt when taking a bomb threat call

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Emergencies may include:**
- Fire
- Hurricanes, floods, and mudslides
- Explosion
- Power failure
- Civil disturbance
- Mass/Food poisoning
- Elevator break down
- Bomb threat
- Other

**2. Emergency numbers should include:**
- Fire department - 114
- Ambulance -115
- Police -113
- Hotel General Manager
- Hotel Security Manager
- Duty manager
- Hotel ERT (Emergency Response Team) list

**3. Hazards/Risks may include but are not limited to:**
- Physical hazards: impact, illumination, pressure, noise, vibration, temperature, radiation
- Biological hazards: bacteria, viruses, plants, parasites, mites, moulds, fungi, insects
- Chemical hazards: dusts, fibres, mists, fumes, smoke, gasses, vapours

**4. Ergonomic injuries may include:**
- Psychological factors – over exertion/excessive force, awkward/static positions, fatigue, direct pressure, varying metabolic cycles
- Physiological factors – monotony, personal relationships etc

**5. Fire detection and fire fighting systems may include:**
- Fire detection devices and systems
- Portable fire extinguishers
- Fire blankets
- Sprinkler systems
- Fire pumps – main and emergency fire pump
- Fire hoses, hydrants
- Smoke detectors
- Alarm bells
- Others

**6. Using types of extinguishers may include:**
- Use water extinguishers for carbonaceous fires only
- Use dry powder, Co2 and gas extinguishers for all categories of fire including electrical
- Use foam for oil or petrol fires, not electrical
- Fire blankets may be used on all categories

**7. Types of injury can include:**
- Small cuts and grazes
- Electric shocks
- Minor heat burns
- Chemical burns from acid or alkali
- Heart attack
- A stroke
- Nervous shock
- Others

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| Where actual incidents have taken place, been addressed and reported, evidence from workplace supervisors should be included. Otherwise, these competences will need to be assessed through simulation, role play and other activities due to the nature of the issues being assessed.<br><br>**Evidence should show (through direct observation or simulation) that the person is able to:**<br>1. Give guests instructions as to where to find the nearest exit in the event of emergency on two occasions.<br>2. Use the correct fires extinguisher on the correct type of fire (simulation) on one occasion<br>3. Communicate effectively with others as required during fire prevention activities and fire emergencies (simulation) on one occasion<br>4. Demonstrate first aid procedures for two emergency situations (simulation)<br>5. Recognise and know how to deal with security threats (oral or written test) | **The following methods may be used to assess competency for this unit:**<br>• Case study<br>• Observation of practical candidate performance<br>• Practical exercises<br>• Role plays<br>• Oral and written questions<br>• Problem solving<br>• Third party reports completed by a supervisor |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All tourism occupations | D1.FO.CL2.03 |

# COS10. UNIT TITLE: USE COMMON BUSINESS TOOLS AND TECHNOLOGY

## UNIT DESCRIPTOR

This unit covers the competencies required to use common business tools and technology.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Access and use common business tools**

P1.  Identify and access business tools required to achieve work outcomes in compliance with the organisational policy and procedures

P2.  Use business tools efficiently and effectively and in compliance with the organisational policy and procedures

P3.  Obtain and maintain business tools required to support workplace activities

P4.  Store business tools in accordance with organisational procedures and to reduce theft and fraudulent activity

**E2.  Select and use common business technology**

P5.  Select appropriate business technology and/or software applications to achieve the requirements of work task

P6.  Use technology in a way which promotes a safe work environment

**E3.  Maintain technology**

P7.  Identify and replace used technology consumables in accordance with manufacturer's instructions and organisational requirements

P8.  Carry out and/or arrange routine maintenance to ensure that equipment is maintained in accordance with manufacturer's instructions and organisational requirements

P9.  Identify equipment faults and take appropriate action in accordance with manufacturer's instructions or by seeking specialized assistance

### KNOWLEDGE REQUIREMENTS

K1.  List and explain sources of information and advice on common business tools and technology relevant to the industry sector

K2.  List and describe the current technology options as appropriate to industry sector, including both hardware and software and their general features and capabilities

K3.  Explain the typical equipment maintenance procedures conducted by operational staff as opposed to specialist maintenance personnel

K4.  List and describe the key factors in achieving productivity and efficiency from common business tools and technology, including effective monitoring and reporting of faults and regular maintenance.

## CONDITIONS OF PERFORMANCE AND VARIABLES

**This unit standard covers the following range:**

**1. Business tools may include:**
- Information, knowledge and other intellectual resources
- Finances
- Facilities
- Equipment
- Stock and supplies

**2. Business technology may include:**
- Computer equipment
- Digital cameras
- Security surveillance technology
- Hand-held input devices
- Communication systems

**3. Software applications may include:**
- Accounting packages
- Database packages
- Presentation packages
- Internet browsers

**4. Work task may relate to:**
- Processing reservations
- Undertaking stock takes
- Processing financial records
- Producing documentation

**5. Consumables may include:**
- Toner
- Discs
- USB drives
- External hardware

**6. Routine maintenance may relate to:**
- Using up-to-date antivirus programs
- Backing up files before major maintenance
- Reviewing and updating program

**7. Specialized assistance may include:**
- Internal maintenance support
- External maintenance support
- Use of commercial 'help' desks
- Contractors
- Manufacturers

## ASSESSMENT GUIDE

**Performance assessment must include:**
1. Observation of at least two business tools used
2. At least two business technologies applied to a particular situation or problem

## ASSESSMENT METHODS

**Suitable assessment methods may include:**
- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Third party reports completed by a supervisor
- Work products

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Most staff in tourism occupations | D2.TCC.CL1.13 |

# GES1. UNIT TITLE: PREPARE FOR WORK

## UNIT DESCRIPTOR

This unit covers the competencies required for timekeeping, personal grooming and hygiene, uniforms, professional behaviours and preparing the work area for the shift.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Report for work**

P1. Report on time and log in

P2. Use staff changing areas for washing, dressing and personal preparation

P3. Turn off any personal communications devices and ensure that they are locked in a safe place in accordance with organisation policy

P4. Go directly to work area and sign in if a departmental attendance sheet is used

P5. Make presence known to other colleagues and/or supervisor

**E2. Ensure grooming and personal hygiene**

P6. Ensure uniform is clean, tidy and safety

P7. Ensure personal grooming is up to standard required

**E3. Apply professional behaviour**

P8. Listen carefully and respond courteously to guests or customers

P9. Communicate professionally on business matters

P10. Ensure the requisite equipment is available to hand

P11. Ensure that personal behaviour brings credit to the property or organisation

**E4. Prepare the work area for the shift**

P12. Read the log book and make a note of any points for action

P13. Take notes relevant to your work at the shift briefing

P14. Attend shift briefing and review your duties for the shift

P15. Review staff movements and arrivals of groups and VIPs

P16. Check equipment and stock levels

P17. Organise the work area in a professional way

---

### KNOWLEDGE REQUIREMENTS

K1. Describe the sequence of procedures when reporting for work

K2. Describe the basic grooming and personal hygiene procedures

K3. Describe what levels of courtesy may be expected by a guest of a service agent

K4. List what personal habits will cause damage to reputation and displeasure to guests

K5. Describe the steps that should be taken prior to starting a shift and what actions to take as a result

## CONDITIONS OF PERFORMANCE AND VARIABLES

### 1. Professional behaviour should include:

- Posture: stand straight with hands aside or behind, never crossed and not leaning or resting against furnishings
- Walk quietly without shuffling feet
- Speech must be clear without shouting or mumbling
- Anger, impatience, sarcasm or boredom should not be shown
- Communication between staff should be discrete and away from guests
- Guests must be recognised and acknowledged promptly and assisted with requirements whenever needed
- Communication with guests should be limited to matters concerning service, organization, department matters or local tourism facilities
- In public areas, staff should not cough, sneeze, sniff, pick nose or teeth, hawk or spit, scratch, lick ends of fingers, belch, yawn, stretch or show any other antisocial behaviour
- Drinks and meals must be taken at the appointed times in the staff area
- Water may be taken during service back-of-house
- Professional staff must not be intoxicated, smell of alcohol or take alcohol during work hours
- Follow organisation policies and procedures

### 2. Reporting procedure should include:

- Being early for shift and ensuring uniform and grooming is to a high standard
- Using the recording device used in the establishment whether a punch card, clocking device, ID card scanner or manual system

### 3. Preparing the work area for the shift could include:

- The log book must be consulted every shift to note past difficulties, actions taken, messages for imminent situations and irregularities
- The arrivals and departures list (whether manual or a computerised screen) should be consulted to ensure that there are enough rooms, to foresee shortages, back-to-back turn-around or special requirements
- Conference and banqueting activity should be known so that guests can be directed to the correct rooms, billing procedures anticipated and associated rooming accommodated. Signage should be present and correct
- Group and airline activity should be monitored so that high volume check-ins and check-outs can be anticipated and prepared for
- Special arrangements and amenities for VIPs should be checked with the relevant departments (housekeeping, F&B)
- Check equipment, stock levels (stationery, vouchers, keys…)

### 4. Grooming & personal hygiene includes:

- Clean hair over the collar for men, tied back for women if long
- Strong smelling lotions or perfumes should not be used
- Hands must be clean at all times, washed after smoking or visiting the toilet
- Only a wedding ring, stud earring, simple necklace and watch should be worn. No bracelets (ankle or wrist), piercings, loose chains or bangles to be worn
- Ensure make up is plain and simple (for female staff) and face is clean-shaven, unless moustache or beard is permitted (for male staff)
- Ensure body is washed and free of unpleasant odours and that hands are clean and fingernails trimmed
- Ensure fresh breath and clean teeth
- A clean shirt/blouse, underwear, socks/tights must be worn at each service period
- All outer garments must be ironed and cleaned regularly or whenever dirty
- Shoes must be clean and polished
- Name badge (as required) must be worn in uniform manner, straight and clean

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Performance assessment must include documentation of the following:**<br>• Record of at least three occasions of good timekeeping and reporting<br>• Record of at least three occasions of good personal hygiene and grooming with correct uniform<br>• Record of at least two customer interactions<br>• Record of at least two occasions of attendance at shift briefings | **The following methods may be used to assess competency for this unit:**<br>• Observation of practical candidate performance<br>• Oral and written questions<br>• Third party reports completed by a supervisor |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff in tourism occupations | DH1.HFO.CL2.03 1.1, 1.2, 1.3 |

# GES2. UNIT TITLE: RECEIVE AND RESOLVE COMPLAINTS

## UNIT DESCRIPTOR

This unit covers the competencies required to receive and resolve customer complaints in a range of settings within the in the hospitality and tourism industry workplace.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Identify and analyse the complaint**

P1. Receive and accurately record a verbal complaint using active listening and empathy techniques

P2. Identify through appropriate communication techniques the exact nature of the customer's complaint

P3. Maintain register or complaint file in accordance with procedures

**E2. Respond to complaints**

P4. Reassure the customer that their complaint will be handled as quickly as possible in order to resolve the problem

P5. Process complaint in accordance with organisation standards, policies and procedures

P6. Obtain and review documentation in relation to complaint

P7. Update register of complaints

**E3. Determine action and resolve complaint**

P8. Agree and confirm action to resolve the complaint with the customer

P9. Demonstrate a commitment to the customer to resolve the complaint

P10. Inform customer of outcome of investigation of complaint

**E4. Refer significant complaints**

P11. Identify complaints that require referral to other personnel, managers or external parties

P12. Refer complaint to appropriate personnel for follow-up in accordance with individual level of responsibility

P13. Forward all necessary documentation including investigation reports to appropriate personnel

P14. Escalate complaints which cannot be resolved to an appropriate person

### KNOWLEDGE REQUIREMENTS

K1. Describe different types of common complaints

K2. Describe the process for handling a simple complaint

K3. Describe the factors in considering handling guests from different cultures

K4. Explain how to record a verbal complaint using active listening and empathy techniques

K5. Relate how to maintain a register or complaint file in accordance with procedures

K6. Explain the process for resolving a customer problem and informing the customer of the outcome of investigation of complaint

K7. Explain the procedure for referring significant complaints

## CONDITIONS OF PERFORMANCE AND VARIABLES

This unit applies to complaints received by any department in the hotel, restaurant or tour and travel company.

**1. Complaints may be related to any expression of dissatisfaction with service by a customer and could include:**
- Written complaints, e.g. letter, email, on website, through social media etc.
- Complaint or feedback form
- Verbal, face-to-face and over the telephone

**2. Appropriate communication techniques may be:**
- The use of active listening with open and closed questions
- Speaking clearly and concisely and using appropriate language and tone of voice
- Giving customers full attention by maintaining eye contact in face-to face interactions
- Note-taking during the conversation

**3. Organisational standards, policies and procedures may include:**
- Complaint handling procedures
- Organisational standard report forms
- Job descriptions
- Code of ethics
- Quality systems, standards and guidelines
- Insurance/liabilities policies

**4. Inform customer of outcome may include:**
- Providing documentation and/or evidence that supports customer complaint
- Information (verbal or written) that directly relates to the complaint being investigated
- Information (verbal or written) that is presented in a calm and accurate manner

**5. Appropriate person may include:**
- Immediate superior within the organisational hierarchy
- Specialist customer service staff

## ASSESSMENT GUIDE

**For the learner to reach the required standard there should be evidence performance gathered through observing the work for:**
1. At least two types of customers
2. At least two types of complaints
3. At least two types of communication methods
4. At least two examples of information provided to customers

## ASSESSMENT METHODS

**This unit may be assessed on or off the job:**
- Assessment should include practical demonstration of complaint resolution processes either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility

**The following methods may be used to assess competency for this unit:**
- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Portfolio evidence
- Problem solving
- Role plays
- Third party reports completed by a supervisor
- Project and assignment work

## RELEVANT OCCUPATIONS

All customer-facing staff in hotels, restaurants or travel and tour operator companies, e.g. Guest Service Agent, Receptionist, Cashier, Concierge, Supervisor

## ACCSTP REF

D1.HOT.CL1.11

## GES3. UNIT TITLE: CLOSE DOWN THE SHIFT

### UNIT DESCRIPTOR

This unit covers the competencies required for closing down the operating shift. It includes preparation for the next shift and securing the facility at the end of operations.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Prepare for shift close down**
P1. Check all equipment is in order
P2. Rearrange and tidy up workplace
P3. Reconcile any cash received during shift

**E2. Prepare for next shift**
P4. Prepare information on events or incidents
P5. Ensure facilities are ready for the shift to begin work
P6. Update the logbook

**E3. Hand over at end of shift**
P7. Handover any cash received
P8. Discuss any follow up required
P9. Brief the next shift and sign the logbook

**E4. Close down facility**
P10. Close down the facility as required
P11. Secure doors and windows
P12. Secure all valuables in safe or other secure area
P13. Turn off equipment, lights and air conditioning

### KNOWLEDGE REQUIREMENTS

K1. List the requirements for shift close down
K2. Identify materials or information to be prepared for the next shift

K3. Describe the shift handover procedure
K4. List the actions in closing down the facility at the end of operating time

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Shift handover could take place in the following situations:**
- In the restaurant
- At the front office
- In the housekeeping department
- In the kitchen
- In the travel or tour office
- In other tourism or hospitality locations

**2. Preparing for facility close down could include:**
- Turning off lights and electrical appliances
- Ensuring doors and windows are secured
- Reconciling cash or other payments received
- Securing valuables including cash in locked location or safe

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| For the learner to reach the required standard there should be evidence performance gathered through observing the person in the workplace.<br><br>**This should include:**<br>1. Preparing for shift handover on two occasions<br>2. Handing over the shift on at least two occasions<br>3. Closing down the facilities on at least two occasions | **This unit may be assessed on or off the job:**<br>• Assessment should include practical demonstration of shift handover either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge<br>• Assessment must relate to the individual's work area or area of responsibility<br><br>**The following methods may be used to assess competency for this unit:**<br>• Case studies<br>• Observation of practical candidate performance<br>• Oral and written questions<br>• Portfolio evidence<br>• Problem solving<br>• Role play<br>• Third party reports completed by a supervisor<br>• Project and assignment work |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Food & Beverage, Waiter/Waitress, Receptionist, Guest Service Agent, Front Office, Housekeeping Attendant, Kitchen, Security, Engineer | N/A |

# GES4. UNIT TITLE: PROCESS FINANCIAL TRANSACTIONS

## UNIT DESCRIPTOR

This unit covers the competencies required to process financial transactions in any hospitality or tourism business.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Process receipts and payments**

P1. Receive and check payments received from the customer and give correct change where appropriate

P2. Prepare and issue accurate receipts including all relevant tax details

P3. Process and record transactions according to organisation procedures

P4. Conduct transactions using appropriate software applications

P5. Conduct transactions to meet organisation speed and customer service standards

**E2. Reconcile takings**

P6. Perform balancing procedures at the designated times according to organisation policy and in consultation with colleagues

P7. Separate any cash floats from takings prior to balancing procedure and secure according to organisation procedures

P8. Determine register or terminal reading or printout where appropriate

P9. Remove payments received and transport according to organisation security procedures

P10. Determine balance between register or terminal reading and sum of payments accurately

P11. Investigate or report discrepancies in the reconciliation within scope of individual responsibility

P12. Record takings according to organisation procedures

### KNOWLEDGE REQUIREMENTS

K1. List and describe procedures for processing different types of transactions in the relevant industry context

K2. Explain the underpinning principles of the reconciliation and balancing process

K3. Define the relevant software, such as point of sale

K4. Explain the role and importance of the reconciliation and balancing process in a broader financial management context

K5. List and describe the security procedures for cash and other financial documentation

K6. Explain how GST (Goods & Sales Tax) affects financial transactions in a given industry context

K7. Explain how to process multiple and varied transactions to address different situations and contexts

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Transactions may include:**
- Cash
- Credit cards
- Cheques
- EFTPOS (Electronic Funds Transfer at Point Of Sale)
- Deposits
- Advance payments
- Vouchers
- Company charges
- Refunds
- Travellers cheques
- Foreign currency

**2. Balancing procedures may be:**
- Manual
- Electronic

**3. Security procedures may relate to:**
- Process for taking cash from customers
- Managing floats, such as when to reduce cash held
- Maintaining low levels of cash in tills
- Rules for when and how cash should be counted
- Handling customer claims of short change
- Transporting takings to the bank
- Procedures in the event of a hold-up
- Controlling in-house credit limit accounts and house limit

## ASSESSMENT GUIDE

**Performance assessment must include:**
1. At least two receipts' processing
2. At least one balancing procedure
3. At least one procedure of handling revenue from sales

## ASSESSMENT METHODS

**Suitable assessment methods may include:**
- Direct observation of the trainee processing financial transactions and balancing takings
- Review of reconciliation documentation prepared by the trainee
- Written or oral questions to assess knowledge of procedures for cash or non-cash transactions
- Review of portfolios of evidence and third-party workplace reports of on-the-job performance by the trainee

## RELEVANT OCCUPATIONS

All staff handling financial transactions in tourism occupations

## ACCSTP REF

D2.TCC.CL1.12

# GES5. UNIT TITLE: ORDER AND RECEIVE NEW STOCKS

## UNIT DESCRIPTOR

This unit describes the competencies required to accept delivery of and store products in an establishment.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.    Accept delivery of new stock**

P1.    Check internal systems to identify incoming stock

P2.    Prepare the area to receive new stock

P3.    Verify delivery  for the premises, check incoming stock against relevant documentation and check stock received against stock ordered

P4.    Identify variations between delivery and documentation

P5.    Return unsuitable stock identified to supplier

P6.    Follow-up on variations between delivery and relevant documentation and manage excess stock within the organisation

P7.    Secure new stock against damage and/or theft

**E2.    Store new stock**

P8.    Move new stock to the required operational area

P9.    Unpack new stock items, as required

P10.  Load new stock into storage units

P11.  Remove waste from the storage areas

P12.  Label new stock to identify items

**E3.    Maintain stock and storage areas**

P13.  Rotate stock aligning with enterprise and stock item requirements

P14.  Inspect stock and storage areas

P15.  Take remedial action where stock related issues are identified

P16.  Clean and tidy storage areas

P17.  Identify stock usage rates

**E4.    Finalize documentation and stock management system requirements**

P18.  Check and verify stock related documentation

P19.  Enter data into stock systems to update stock levels

P20.  Authorize supplier documentation for processing and payment

### KNOWLEDGE REQUIREMENTS

K1.    Explain the functions of internal stock control systems, paper-based or electronic/ computerized stock control systems

K2.    Describe the organisation's policies and systems in regard to order and receive new stock

K3.    Explain procedure of storing new stock

K4.    Explain procedure of  maintaining stock and storage areas

K5.    Describe types of documentation and procedure of finalizing the documents

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **Internal systems may include:**
   - Purchase orders
   - Verbal orders that have been placed
   - Standing orders
   - Telephone orders
   - Online orders
   - Facsimile orders
   - Manual or computerized stock control/management systems

2. **Prepare the area may include:**
   - Cleaning the area
   - Tidying the area
   - Removing other stock from the area
   - Ensuring requirements for accepting deliveries are present (weighing scales, thermometers, purchase orders, purchase specifications)
   - Ensuring security and safety requirements are in place

3. **Stock may include:**
   - Food and beverage items
   - Equipment
   - Cleaning materials and chemicals
   - Stationery and office supplies
   - Vouchers and tickets
   - Souvenir products and merchandise

4. **Verify delivery may be related to:**
   - Checking that the stock being delivered has been ordered
   - Checking that the delivery is being made to the correct location

5. **Check incoming stock against relevant documentation should include:**
   - Ensuring all items ordered have been supplied and all items listed have been delivered
   - Ensuring all items are delivered in good condition, correct size, brand, quality, quantity, quantity
   - Ensuring the correct price has been charged
   - Applying specific food safety checks to food and beverage items
   - Rejecting unsatisfactory goods

6. **Check stock received against stock ordered must include:**
   - Ensuring all stock ordered has been received
   - Ensuring only stock ordered has been received
   - Ensuring all aspects of the delivery match the order placed

7. **Identify variations may include:**
   - Making note of the nature of the variation
   - Recording the variation on accompanying documentation and internal system
   - Making verbal mention to the delivery driver, where applicable

8. **Documentation (paper-based or electronic versions) may include:**
   - Purchase orders & purchase order guides
   - Delivery dockets
   - Invoices
   - Buying catalogues
   - Purchase specifications
   - Others

9. **Return stock may relate to:**
   - Damaged stock
   - Out of date stock
   - Recalls
   - Excess stock
   - Unsatisfactory goods
   - Poor quality goods

10. **Follow-up on variations may include:**
    - Requesting credit notes from suppliers, where applicable
    - Ordering supplementary stock
    - Recording action taken and arrangements with suppliers
    - Informing internal personnel/departments regarding delivery problems

11. **Manage excess stock may include:**
    - Monitoring stock levels
    - Reducing stock levels
    - Returning excess stock to supplier
    - Attempting to exchange excess stock with another organisation
    - Suggesting uses for excess stock
    - Monitoring the use-by dates of stock

12. **Unpack stock items may include:**
    - Removing individual items from cartons and packaging
    - Checking quality and suitability of individual items as they are unpacked
    - Determining items that should be left in cartons and packaging
    - Maintaining the integrity of foods and beverages

13. **Storage units may include:**
    - Shelves
    - Bins
    - Specially provided storage containers
    - Refrigeration and freezer units

14. **Remove waste may include:**
    - Taking packaging out of storage areas
    - Identifying and removing damaged or un-saleable items from the storage areas
    - Applying environmentally friendly practices to waste materials where appropriate

## CONDITIONS OF PERFORMANCE AND VARIABLES

**15. Label stock may include:**
- Placing labels on storage containers and shelving to identify stock items and indicate delivery date
- Preparing hand written labels and attaching them to individual stock items
- Using electronic bar coding and labelling equipment
- Observing food safety requirements in relation to the labelling of food

**16. Rotate stock may include:**
- Applying stock rotation protocols relevant to individual stock type

**17. Inspect stock may include:**
- Undertaking visual inspections of storage area
- Identifying stock approaching use-by date and out of date stock
- Adhering to internal inspection schedules and checklists
- Checking stock quality
- Looking for signs of pest infestation, physical damage to the storage area itself, damage or degradation to stock items
- Ensuring stock is aligned with designated storage areas, bins etc

**18. Take remedial action may include:**
- Notifying relevant personnel
- Arranging for maintenance, including in-house and external
- Re-Locating stock

**19. Identify stock usage rates may include:**
- Identifying fast and slow-moving stock items
- Advising relevant personnel in relation to stock usage and the need to order additional stock

**20. Authorize supplier documentation may include:**
- Noting issues arising on the documentation
- Recording associated action taken in relation to the identified issue
- Signing, initialling and/or dating documents.

## ASSESSMENT GUIDE

This unit should be assessed by documentary evidence of performance and oral or written questioning.

**Evidence must include:**
1. Three documented examples of stock received, verified, checked and action taken for variations, unsuitable stock and securing new stock against theft or damage
2. Two documented examples of new stock moved, unpacked, stored and labelled correctly in correct location
3. Two documented examples of how stock has been rotated, inspected and monitored
4. Two documented examples stock documentation, including stock system, updating records and authorizing supplier documentation for processing of payments

## ASSESSMENT METHODS

**The following methods may be used to assess competency for this unit:**
- Observation of practical candidate performance
- Analysis of documentation used in the receiving of stock and the storage process
- Inspection of stock and storage areas
- Role plays
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| Staff in tourism occupations | D1.HGA.CL6.09-10 |

# GES6. UNIT TITLE: PROMOTE AND SELL PRODUCTS AND SERVICES

## UNIT DESCRIPTOR

This unit covers the competencies required to promote and sell products and services in a hospitality or tourism and travel business.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Promote products and services face to face**

P1. Identify customer requirements

P2. Match available products/services to customer needs and make recommendations

P3. Present features and benefits of a full product/service range to customers, individually or in small groups

P4. Explain to customers how product may be purchased and payment made

**E2. Plan a promotional event**

P5. Welcome customers on arrival

P6. Provide customers with seats, drinks or other predetermined hospitality

P7. Issue customers with pre-prepared information packs

P8. Resolve any hitches or unexpected events with resources available

**E3. Run a promotional event**

P9. Observe interest shown by participants and react to it constructively

P10. Present material to customers in a clear and informative manner

P11. Control timing of event in such a way that it achieves its purpose with any necessary flexibility

P12. Use visual aids

P13. Encourage and respond to questions

P14. Advise customers on how promoted products may be purchased

P15. Ensure that all activity conforms to legislation and health and safety codes

**E4. Plan promotional displays**

P16. Identify the purposes of the display and ensure it is relevant to organisation and customer needs

P17. Plan the design and content of the display to be appropriate to the needs and standards of organisation and customers

P18. Organise place where display may be made with regard to purpose and security

P19. Obtain and create material for display

**E5. Set up and maintain displays**

P20. Display the material logically and informatively including all required to meet its purposes and with regard to available space

P21. Secure the display so that it is stable, protected from weather and safe for users

P22. Maintain the tidy and clean nature of the display regularly

P23. Add to amend and update the display as required

P24. Change the display as soon as its usefulness or attractiveness deteriorates

**E6. Finalize sales**

P25. Accept payment

P26. Apply correct exchange rates to sales

P27. Issue tickets and other documents against payments

P28. Report sales clearly and promptly

### KNOWLEDGE REQUIREMENTS

K1. Explain principles of sales and promotion

K2. List features and benefits of products and services offered by the organisation/hotel/agent

K3. Explain how to overcome sales objections

K4. Define the objectives of the promotional event

K5. List the equipment and information materials to be prepared for the event

K6. Explain how public presentation skills will be effectively used at this event

K7. List visual aids to be prepared for the event

K8. Explain what communication skills will be required as part of the event

K9. List the most likely unexpected events and how they may be expected and so avoided

K10. List the material to be contained in a sales and promotion file

K11. List the information to be displayed on a notice board

K12. Itemize display standards of organisation

K13. List sources of relevant material

## KNOWLEDGE REQUIREMENTS

K14. Explain simple principles of display with regard to use of space, colour, language, neatness and graphics

K15. Explain the consequences of displaying out of date information

K16. List full range of product and service prices

K17. Identify requirements for the processing of payments by different means

K18. List sales reporting documents and procedures

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **Products and services in hospitality and tourism could include:**

   Hotel events, conferences, meetings, cruises, feluccas, dive trips, glass bottom boats, historical and cultural sightseeing, sound and light, entertainment, cultural shows, meals, theatre, riding tours and others

2. **Promotional tools could include:**
   - Tour file,
   - Notice board
   - Display board and lighting
   - Display documentation
   - Handwritten, typed or pre-printed material
   - Photographs and graphics
   - Others

3. **Payment can be made by:**
   - Cash
   - Traveller's cheques
   - Credit and charge cards
   - Bank transfer
   - Others

4. **Sales reporting can be made by:**
   - Telephone
   - Organisational report forms
   - E-mail
   - Face to face

## ASSESSMENT GUIDE

**Performance assessment must include:**

1. At least two sales or promotions
2. At least three promotional event plans developed as a basis
3. At least three customer feedback questionnaires and/or survey analysis

## ASSESSMENT METHODS

**Suitable assessment methods may include:**
- Direct observation
- Written or oral questioning to assess aspects of specialised knowledge
- Naturally occurring evidence in the workplace
- Simulation, which must be carefully designed/undertaken to reflect reality of a true work environment
- Review of portfolios of evidence and third party workplace reports of on the job performance by the individual

## RELEVANT OCCUPATIONS

All areas in tourism organisations

## ACCSTP REF

D2.TCC.CL1.08

# GES8. UNIT TITLE: MAINTAIN FOOD SAFETY AND HYGIENE

## UNIT DESCRIPTOR

This unit describes the competencies required to ensure food safety and hygiene in a hotel, restaurant or other establishment where food is prepared or handled.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Follow hygiene procedures and identify food hazards**

P1. Follow organisational hygiene procedures

P2. Identify food hazards that may affect the health and safety of customers, colleagues and self

P3. Remove or minimise any hygiene hazards

P4. Avoid food handling activities where a health issue may cause food contamination

**E2. Report any personal health issues**

P5. Report unsafe practices that do not follow hygiene procedures

P6. Report any personal health issues likely to cause a hygiene risk

P7. Report incidents of food contamination resulting from personal health issues

**E3. Prevent food contamination**

P8. Maintain clean clothes and wear required personal protective clothing and headgear

P9. Prevent food contamination from clothing and other items worn

P10. Prevent unnecessary direct contact with ready to eat food

P11. Avoid unhygienic personal contact with food or food contact surfaces

P12. Avoid unhygienic cleaning practices that may cause food-borne illnesses

**E4. Prevent cross contamination by washing hands**

P13. Wash hands at appropriate times and follow hand washing procedures consistently

P14. Wash hands using appropriate facilities

### KNOWLEDGE REQUIREMENTS

K1. Identify food safety and hygiene regulation and procedures

K2. Describe reasons that lead to food hazards

K3. List the causes that could affect the health and safety of customers, colleagues and self

K4. Describe methods to prevent food contamination

K5. Explain how to prevent unnecessary direct contact with ready to eat food

K6. Explain how to avoid unhygienic personal contact with food or food contact surfaces

K7. Explain how to avoid unhygienic cleaning practices that may cause food-borne illnesses

K8. Give the reasons why it is important to store raw and prepared food separately

K9. Explain what to do when a customer asks for reassurance that a certain dish is free from their allergy reactive food

K10. Explain the importance of washing hands

## CONDITIONS OF PERFORMANCE AND VARIABLES

1. **The ways in which standards of food safety and hygiene can be ensured may include:**
   - Food storage
   - Handling and disposal of garbage
   - Personal hygiene
   - Regular hand washing
   - Safe and hygienic handling of food and beverages
   - Safe handling and disposal of linen and laundry
   - Suitable dress and personal protective equipment and clothing
   - Use of cleaning equipment, clothes and materials to avoid contamination of food
   - Follow hygiene signage
   - Follow instructions of supervisors and/or managers
   - Obey regulations of the food hygiene and safety

2. **Avoid food hazards by:**
   - Removing contaminated food
   - Removing contaminated garbage
   - Cleaning dirty equipment and utensils
   - Making sure equipment is working correctly, such as fridge and temperature probes
   - Using clean items
   - Preventing blood and body secretions
   - Avoiding practices not in keeping with current organisational activities
   - Preventing vermin and pests from the kitchen or restaurant.

3. **Dealing with health issues may include:**
   - Report airborne diseases
   - Report food borne diseases
   - Report infectious diseases.

4. **Food handling that could lead to unsafe and unhygienic food may include:**
   - Personal items:
     - Bandages
     - Hair accessories
     - Jewellery
     - Watches
     - Rings.
   - Personal contact may involve:
     - Blowing nose
     - Coughing
     - Drinking
     - Eating
     - Scratching skin and hair
     - Sneezing
     - Spitting
     - Touching wounds
     - Smoking cigarette.
   - Food contact surfaces may include:
     - Chopping boards
     - Containers
     - Cooking utensils
     - Crockery
     - Cutlery
     - Glassware
     - Pots and pans
     - Sinks
     - Workbenches.
   - Unhygienic leaning practices may involve:
     - Cleaning food contact surfaces
     - Cleaning cloths
     - Tea towels
     - Spreading bacteria from other areas.

5. **Wash hands should take place:**
   - Before commencing or recommencing work with food
   - Immediately after:
     - Handling raw food
     - Smoking
     - Coughing
     - Sneezing
     - Blowing the nose
     - Eating
     - Drinking
     - Touching the hair
     - Scalp or any wound
     - Using the toilet.

6. **Appropriate facilities for hand washing may include:**
   - Designated hand washing sink
   - Liquid soap
   - Single use towels
   - Warm running water.

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Evidence of the following is required:**<br>1. Four food hazards identified<br>2. Four occasions of removing or minimising any hygiene hazards<br>3. Four occasions of hygienic personal contact with food or food contact surfaces<br>4. Four occasions of cleaning procedures<br>5. Four occasions of washing hands | **The following methods may be used to assess competency for this unit:**<br>• Observation of practical candidate performance<br>• Practical exercises that reflect the workplace apply of food safety and hygiene standard<br>• Recorded oral and/or written questions and multiple choice question<br>• Third party reports completed by a supervisor |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All Food & Beverage Staff including Waiter/Waitress | D1.HRS.CL1.02 & 05 |

## GES9. UNIT TITLE: DEVELOP GUEST RELATIONSHIPS

### UNIT DESCRIPTOR

This unit covers the competencies required to start conversations and develop good relationships with guests or customers.

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### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Meet and greet guests**
P1. Welcome guests appropriately
P2. Introduce self and others
P3. Ask questions to involve guests

**E2. Respond to guests' questions or requests**
P4. Answer questions clearly and honestly
P5. Request repetition or clarification of questions or requests
P6. Offer to fulfil guest's request in a timely manner
P7. Provide explanation and apologize if unable to answer questions or fulfil requests on the spot and promise to answer in certain time.
P8. Offer to seek help from other sources if unable to fulfil guest's request/s or answer questions

**E3. Participate in a short, informal conversation with guests**
P9. Start a conversation using appropriate topics
P10. Demonstrate turn taking techniques to hold and relinquish turns in a conversation
P11. Show interest in what a speaker is saying
P12. Interrupt a conversation politely
P13. Close a conversation politely

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### KNOWLEDGE REQUIREMENTS

K1. Meet and greet guests warmly
K2. Explain how to hold a short conversation with guests using turn taking techniques
K3. Explain the usage of correct open and closed question forms, including the use of auxiliary verbs , "wh" questions and question tags to involve guests in conversations

K4. Describe how to discuss a range of topics
K5. Explain how to talk about events in the past, present and future
K6. Describe how to identify potential taboo topics that may cause offence to guests
K7. Explain how to use a range of functions when responding to guests' questions and requests

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### CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Developing guest relationships can include:**
• Giving information and advice
• Giving advice
• Making suggestions
• Asking questions
• Giving directions
• Giving instructions
• Giving explanations

**2. Developing appropriate personal manner and behaviour includes:**
• Offering opinions
• Agreeing and disagreeing politely
• Apologising
• Promising to follow up a request
• Giving factual information
• Considering culture differences

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| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Performance assessment must include:**<br>1. Evidence of at least three occasions of greeting guests appropriately should be observed or documented<br>2. At least three occasions of responding to guests' questions or requests should be observed or documented<br>3. At least three occasions of participating in a short, informal conversation with guests and demonstrating appropriate personal manner and behaviour should be observed or documented<br>Knowledge assessment by documented oral questioning or written questions | **Suitable assessment methods may include:**<br>• Observation of practical candidate performance<br>• Interviews<br>• Role plays |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff who interact with guests or customers in tourism | D2.TTG.CL3.14 |

# GES10. UNIT TITLE: PREPARE AND PRESENT REPORTS

## UNIT DESCRIPTOR

This unit covers the competencies required to develop, produce and present a range of reports used by the tourism and hospitality industry.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Prepare various types of reports**
P1.  Develop report to specifications as required
P2.  Identify sources of data and access report data that underpins the final report objective(s)
P3.  Process data for inclusion in the report
P4.  Produce the report

**E2.  Present various types of reports**
P5.  Distribute reports according to internal requirements
P6.  Deliver a verbal presentation in support of the report

### KNOWLEDGE REQUIREMENTS

K1.  Describe the different types of reports used in your organisation and the purposes of each report
K2.  Describe how to format reports or other documents used in your organisation
K3.  Describe the principles of confidentiality and security in relation to internal documentation and reports

K4.  Explain how to ensure reports and other documents are clear and readable
K5.  Describe the ways in which you can produce diagrams, tables and graphics to make reports more readable and understandable
K6.  Explain the steps you need to take to prepare for and deliver a verbal presentation

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Develop report to specifications may include:**
- Clarifying report objectives with relevant personnel and/or key stakeholders
- Planning the final content of the report, including developing rationales for omitting certain information
- Planning the format of the report, unless a standardised format exists
- Matching the report to the identified report objectives

**2.  Sources of data may include:**
- Field work
- Research materials
- Published books
- Academic reports
- Industry reports
- Colleagues
- Computerised databases
- Internet searches and specific websites
- Newspapers and journals
- Industry publications
- Industry specialists and experts
- Others

**3.  Access report data may include:**
- Authorising release of relevant data and/or information that is commercial-in-confidence
- Ensuring information from all available sources of data has been obtained
- Verifying accuracy and currency of data, as far as is possible
- Examining available data
- Examining systems to establish data limitations
- Others

**4.  Analyse data for inclusion may include:**
- Ensuring report data is analysed in such a way that the process meets organisational objectives and requirements, which may include:
  a. Timelines
  b. Policy documentation requirements
  c. Verbal and written instructions given in relation to activities related to data analysis
  d. Internal control guidelines
  e. Computer system documentation
- Identifying the required and most applicable format as identified by the organisation
- Others

## CONDITIONS OF PERFORMANCE AND VARIABLES

5. **Produce the reports may include:**
   - Entering the required data into the report
   - Editing data as required
   - Saving, filing, sending and printing the reports

6. **Using advanced functions to ensure completion of the task, which may include:**
   - Creating AutoText
   - Templates
   - Macros
   - Table of contents
   - Index
   - Newspaper columns
   - Glossaries
   - Scanning
   - Importing data, such as tables, graphs and charts from spread sheets
   - Others

7. **Meeting designated timeline requirements, which may include:**
   - As agreed with supervisors and management
   - Nominated organisational deadlines as specified in policies, by operational imperatives and as determined by traditional practice
   - Deadlines negotiated with individual end-users and/or persons requesting the report
   - Inserting information from other files as necessary, including scanning and data importing
   - Checking report for spelling, grammar and numeric data
   - Proof reading reports for validity, reliability, accuracy of contents, consistency of layout and structure, applicable language and style
   - Ensuring the report accords with organisational standards relating to formatting and other standards
   - Ensuring the contents of the report reflect the stated objectives for the report and address the key management and operational requirements, as well as providing relevant and supporting ancillary information
   - Making modifications to reports on the basis of errors, omissions, or inconsistencies identified during proof reading and checking activities
   - Presenting report to nominated person for approval prior to final printing, where appropriate
   - Printing the report
   - Binding the report
   - Saving and filing the report
   - Making back-up copies of files and reports, as necessary and in keeping with organisational requirements

8. **Distribute reports may include:**
   - Completing and circulating reports in keeping with policy guidelines that apply
   - Hand delivering reports directly to nominated individuals
   - Placing hard copy reports into designated locations such as pigeon holes
   - Forwarding electronic copies of reports according to a distribution list
   - Observing security and confidentiality requirements
   - Obtaining signature to prove report has been delivered and received
   - Including reports with other nominated material as part of meeting and/or briefing papers
   - Ensuring reports are received in sufficient time to enable them to be read and digested by the user prior to a nominated meeting, or other decision-making event

9. **Deliver a verbal presentation may include:**
   - Ensuring language and tone is appropriate to the audience
   - Providing full, or short-form, hard copies of the report at the presentation
   - Ensuring presentation is organised logically and is structured and balanced according to purpose, audience and context
   - Generating and/or acquiring physical resources for use in supplementing and/or illustrating the presentation
   - Adhering to industry and/or organisational standards in relation to the verbal presentation
   - Practicing and polishing the presentation

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Performance assessment must include:**<br>1. Preparation of at least two types of reports<br>2. Two occasions when at least two verbal presentations are made | **Suitable assessment methods may include:**<br>• Analysis of a portfolio of documents prepared by the candidate<br>• Evaluation of the presentation made to support the reports(s)<br>• Oral and written questions<br>• Third party reports completed by a supervisor<br>• Project and assignment work<br>• Observation of practical candidate performance |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All areas within tourism | D1.HGA.CL6.08 |

# GES14. UNIT TITLE: PREVENT, CONTROL AND FIGHT FIRES

## UNIT DESCRIPTOR

This unit describes the competencies required to prevent, control and fight fires, including fire prevention measures and fire fighting.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.  Manage fire prevention and control procedures**

P1.  Identify fire hazards in the premises and take action to eliminate or minimise them

P2.  Review and become familiar with emergency procedures to be followed in the event of fire

**E2.  Deal with fire in the premises**

P3.  Fight fires using relevant equipment and techniques

P4.  Select and used correct extinguishers to fight specific classes of fires

P5.  Ensure personal safety during fire fighting at all times

P6.  Ensure actions minimise damage to facilities and avoid injuries to personnel

### KNOWLEDGE REQUIREMENTS

K1.  Explain the principles of containing and extinguishing the spread of fire

K2.  Describe the different classes of fire and the equipment needed for extinguishing fire

K3.  List the types of fire detection, fire fighting equipment and systems used in a hotel or travel company

K4.  Explain the fire fighting techniques applicable to different classes of fire

K5.  Discuss the relevant regulations about checking and use of fire detection and fire fighting equipment

K6.  Explain the fire fighting procedures used in your facility

K7.  Describe the problems that can occur with fire detection and fire fighting equipment and operations and appropriate remedial action and solutions

K8.  List the sources of information on fire prevention and extinguishment available

### CONDITIONS OF PERFORMANCE AND VARIABLES

**1.  Fire detection and fire fighting systems may include:**
  • Fire detection devices and systems
  • Portable fire extinguishers, including foam, water, $CO_2$, dry chemical and wet foam (where applicable)
  • Sprinkler systems
  • Fire pumps – main and emergency fire pump
  • Fire hoses, hydrants

**2.  Personal protection clothing and equipment may include:**
  • Masks and goggles
  • Protective clothing, including headgear, gloves and footwear

**3.  Documentation and records may include:**
  • Fire detection, fire fighting and safety equipment operational and maintenance instructions and recommended procedures
  • Instructions on the maintenance and serviceability of fire detection, fire fighting and safety equipment and systems

| ASSESSMENT GUIDE | ASSESSMENT METHODS |
|---|---|
| **Assessment will be in a simulated environment, unless evidence from dealing with an actual fire has occurred. The following activities should be demonstrated and confirmed through assessment.**<br><br>1. Identify relevant fire detection and fire fighting equipment and initiate any required reporting or servicing action<br>2. Use the various types of fire fighting equipment in the organisation<br>3. Implement OH&S principles and policies when carrying out fire prevention and fire fighting duties<br>4. Communicate effectively with others as required during fire prevention activities and fire emergencies | • Assessment of knowledge must be conducted through appropriate written/oral examinations<br>• Individuals should carry out a range of suitably simulated practical and knowledge assessments that demonstrate the skills and knowledge to carry out fire prevention strategies in their working premises; and/or assist in fire prevention procedures and fire fighting drills<br><br>**Note:** Simulated fire fighting assessment exercises may require access to a fire training and assessment facility capable of simulating fire fighting activities.<br><br>Assessments must be conducted in accordance with relevant OH&S requirements |

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All tourism staff | N/A |

# GES15. UNIT TITLE: DEAL WITH INTOXICATED AND UNAUTHORIZED PERSONS

## UNIT DESCRIPTOR

This unit covers the competencies required to deal with intoxicated or unauthorised persons in hotels, restaurants, in other facilitiesor on tours.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1.   Assess the situation**

P1.   Analyse situation carefully to assess intoxication levels of customer(s)

P2.   Monitor suspicious behaviour by groups or individuals in your workplace

**E2.   Confront the situation**

P3.   Offer assistance to intoxicated customers

P4.   Question suspicious individuals to determine the purpose of their presence in your workplace

**E3.   Seek assistance from appropriate persons**

P5.   Refer difficult situations to an appropriate person within or outside of the establishment

P6.   Seek assistance from appropriate people for situations which pose a threat to safety or security of colleagues, customers or property

**E4.   Take action to alleviate the situation**

P7.   Deal with intoxicated persons appropriately and assist the guest/customer to leave the premises if necessary

P8.   Request unauthorised individuals to leave,  and arrange an escort from the premises

**E5.   Complete incident reports**

P9.   Complete incident report on dealing with intoxicated persons or unauthorised entry

### KNOWLEDGE REQUIREMENTS

K1.   Describe the behaviour you would expect from intoxicated customers

K2.   Explain the sort of assistance you could offer to intoxicated customers

K3.   List the types of difficult situations where you would need to refer to an appropriate person within or outside of the establishment

K4.   Explain when you would need to seek assistance from appropriate people for situations which pose a threat to safety or security of colleagues, customers or property

K5.   Describe how you would appropriately assist the intoxicated guest/customer to leave the premises

K6.   Explain the methods used to monitor suspicious behaviour by groups or individuals in your workplace

K7.   List the types of questions you could use to determine the purpose of suspicious individuals in your workplace

K8.   Explain how you would arrange for an unauthorised individuals to leave the premises

K9.   Describe the format and content of incident reports required

## CONDITIONS OF PERFORMANCE AND VARIABLES

The unit variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between hospitality and tourism organisation.

1. **Assess intoxication levels may include:**
   - Observation of changes in behaviour
   - Monitoring noise levels
   - Monitoring drink orders
   - Slowing service

2. **Assistance for intoxicated persons may include:**
   - Organising transport for customers wishing to leave
   - Suggesting staying in a room in the hotel
   - Assisting customers to leave

3. **Appropriate persons may include:**
   - Manager
   - Security personnel on site
   - Police
   - Ambulance

4. **Procedures may include:**
   - Verbal warning
   - Asking persons to leave the premises
   - Calling for appropriate assistance

5. **Question suspicious individuals may include:**
   - Using tact and discretion
   - Using a quiet and respectful tone of voice at all times
   - Employing conflict resolution skills

6. **Appropriate communication skills may relate to:**
   - Giving explanation to customers throughout the event/incident
   - Providing suggestions and/or alternatives to the customer
   - Using a quiet and respectful tone of voice at all times
   - Using tact and discretion
   - Employing conflict resolution skills

7. **Assess situations may relate to:**
   - Customers behaving in an intoxicated manner
   - Customers behaving in a violent or disorderly manner
   - Customers behaving in a suspicious manner
   - Under-age persons

8. **Deal with intoxicated persons may relate to:**
   - Providing suggestions and/or alternatives to the customer/guest
   - Asking customer/guest to leave the premises
   - Refusing service of alcohol

## ASSESSMENT GUIDE

**Performance assessment should be based on case studies and real incidents. Incident reports would normally provide much of the evidence along with supervisor reports or witness statements. In a college setting, simulation and role play could be used.**

1. At least one incident of handling intoxicated persons appropriately in the hotel or travel/tour company should be recorded by documentary evidence or observation
2. At least one incident of handling suspicious persons appropriately in the hotel or travel/tour company should be recorded by documentary evidence or observation
3. All knowledge criteria should be assessed by recorded oral questioning or by written questions

## ASSESSMENT METHODS

**The following methods may be used to assess competency for this unit:**
- Observation of practical candidate performance
- Oral and written questions
- Portfolio evidence
- Incident reports
- Role plays/simulation
- Third party reports completed by a supervisor
- Project and assignment work

| RELEVANT OCCUPATIONS | ACCSTP REF |
|---|---|
| All staff working in hotels, restaurants as well as travel and tour operator companies | D1.HBS.CL5.17 |

## GES21. UNIT TITLE: APPLY RESPONSIBLE FOOD AND BEVERAGE PRACTICES

### UNIT DESCRIPTOR

This unit covers the competencies required to save energy and water, manage waste and use local environmentally-friendly products in food preparation and food and beverage service.

### ELEMENTS AND PERFORMANCE CRITERIA

**E1. Save energy**
P1. Reduce idle time for all equipment
P2. Shut down equipment during off peak and after hours
P3. Use equipment efficiently to reduce energy usage

**E2. Save water**
P4. Conserve water usage and report leaks
P5. Run dishwashers when fully loaded
P6. Save water when washing utensils and cleaning the kitchen

**E3. Avoid waste**
P7. Avoid waste by reprocessing materials where possible
P8. Recycle waste products efficiently
P9. Avoid plastic and disposable containers where possible

**E.4 Purchase and use environmentally-friendly products**
P10. Purchase local goods and food supplies as far as possible
P11. Use environmentally friendly cleaning products

### KNOWLEDGE REQUIREMENTS

K1. Explain the methods used in your restaurant/kitchen for saving energy, water and waste management
K2. Explain the importance of adopting responsible tourism principles in food preparation or F&B service
K3. Identify the ways to save energy consumption in food production/service

K4. Identify the ways of saving water in kitchen operations and restaurant service
K5. List the ways of increasing the use of recycling in food preparation and F&B service
K6. State how to minimize waste and improve recycling
K7. Identify the sources for local goods and food supplies

## CONDITIONS OF PERFORMANCE AND VARIABLES

**1. Energy saving practices in food preparation and/or F&B service could include:**
- Clean and service kitchen equipment regularly
- Prepare food efficiently and in large batches if possible
- Reduce equipment standby and pre-heating time
- Use appropriate sized sauce pans and lids to minimise wasted heat
- For small orders or one customer, use frying pan rather than griddle
- Thaw food in the refrigerator overnight rather than using running water or microwaves
- Minimise opening of oven doors and refrigerator and chiller doors to save energy

**2. Water efficiency in kitchen operations could include:**
- Sweep or mop kitchen floors instead of using a hose
- Only run dishwashers when full
- Switch off hot water heaters at night

**3. Avoid waste in food production and F&B service could include:**
- Recycling food waste in the kitchen
- Adjusting portion sizes to avoid excessive food waste
- Using bins for food wastes, general wastes and recyclables
- Minimise over-prepping food that will then be wasted
- Arrange compost for food waste rather than sending it to the trash bin
- Collect cooking oils and fats for re-processing and reuse
- Review food portion sizes and adjust to avoid excessive food wastes

**4. Environmentally-sustainable kitchen operations and F&B service could include:**
- Using recycled content and recyclable takeaway containers, cups, utensils and serviettes
- Purchase environmentally-friendly products
- Purchase products that minimise energy, water and waste in the production process
- Purchase local products to benefit local businesses and avoid transport costs and wasted energy

## ASSESSMENT GUIDE

**Evidence should include:**
1. At least two occasions of energy saving practice documented
2. At least two occasions water efficiency and waste avoidance activities recorded and documented
3. At least one example of recycling documented
4. At least one example of environmentally-friendly purchasing documented
5. Fully completing the knowledge assessment as set out in the unit either by recorded oral questioning or answers to written questions.

## ASSESSMENT METHODS

**Suitable methods will include:**
- Workplace observations
- Portfolio of workplace evidence
- Personal statements
- Witness testimony
- Professional discussion

Simulation can be used in colleges or in the workplace for some performance criteria but should be used sparingly.

A portfolio or written report should be supplemented by oral questions to ensure all aspects of the evidence requirements are fully met.

## RELEVANT OCCUPATIONS

All food preparation and F&B service staff

## ACCSTP REF

N/A

# VIETNAM TOURISM OCCUPATIONAL STANDARDS (VTOS)

VTOS covers two major divisions within the tourism sector (hospitality and travel) with six key and four specialist occupational areas. For more information, please visit http://vtos.esrt.vn

## Hospitality Division

Front Office Operations

Housekeeping Operations

Food & Beverage Service

Food Preparation

## Travel Division

Travel and Tour Operations

Tour Guiding

## Specialist areas

Hotel Management

Small Accommodation Operations

On-site Tour Guiding

Tourist Boat Service