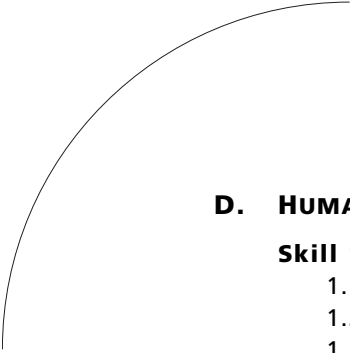


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INTRODUCTION

In Canada, the tourism sector employs 1.67 million people. Worldwide, tourism is one of the largest and fastest growing sectors. It is a dynamic and competitive sector, offering a variety of employment opportunities. The Canadian Tourism Human Resource Council (CTHRC) serves as a national forum to facilitate human resource development activities that support a globally competitive and sustainable Canadian tourism sector.

The Council's objectives include setting vision and direction for tourism human resource development in Canada, promoting a training culture in the tourism sector, and co-ordinating national occupational standards and certification. The Council acts as an advocate on tourism human resource development issues at the national and international levels.

The Council works closely with business, labour, provincial and territorial tourism education councils, national industry associations, the education and training community, and governments across the country. These tourism partners share resources and jointly develop and implement national projects and programs in the tourism sector.

National, provincial, and territorial tourism sector associations have worked together since 1987 to achieve sector-based occupational standards and certifications that are recognized across Canada. The Canadian Tourism Human Resource Council co-ordinates the efforts of the provincial and territorial councils. This encourages the sharing of information and ideas, while ensuring that consistency of product and quality is maintained and duplication of effort is avoided. This process supports the development of only one national standards and certification program for any tourism occupation.

This occupational standards document represents the knowledge, skills, and attitudes required to be considered competent in this occupation. Developed 'by the industry, for the industry,' these standards represent the collective expertise of sector professionals across Canada who work in this occupation. The standards are designed to be used by sector and educational institutions in the training, professional development, and certification of industry professionals.

For more information on how you can benefit from these standards, please contact the tourism education council in your province or territory. The addresses and telephone numbers are listed at the end of this document.

STANDARDS OVERVIEW

WHAT ARE STANDARDS?

Standards are statements outlining the knowledge and performance required of an individual to be considered competent in an occupation. By learning and mastering the content of these standards, your knowledge and performance will meet industry expectations.

WHY DEFINE STANDARDS?

Central to the mandate of the Canadian Tourism Human Resource Council (CTHRC) is the enhancement of the image of hospitality within both the industry and the general public. Defining standards is one way to help increase understanding of the broad range of skills required of those working within this industry.

WHO BENEFITS FROM STANDARDS?

Eventually, all will benefit from the monitoring of performance in relation to industry standards. As standards gain recognition, industry professionals will be able to increase their skills and knowledge and be recognized for their abilities. This will benefit local and visiting consumers and increase satisfaction within the hospitality and tourism sectors.

Specific groups that can benefit from standards are:

■ *Industry Professionals*

- Standards help to identify career paths.
- Standards enhance the public and professional image of tourism careers.
- Standards provide a basis for challenge, self-improvement, and advancement.
- Standards provide the basis for certification, based upon competent performance.

■ *Employers and Owners*

- Standards define areas where employees must be proficient, which assists in recruiting, training, and development of staff.
- Standards provide employers and owners with a highly trained workforce, which can increase productivity and decrease costs incurred by high staff turnover, translating into an improved bottom line.

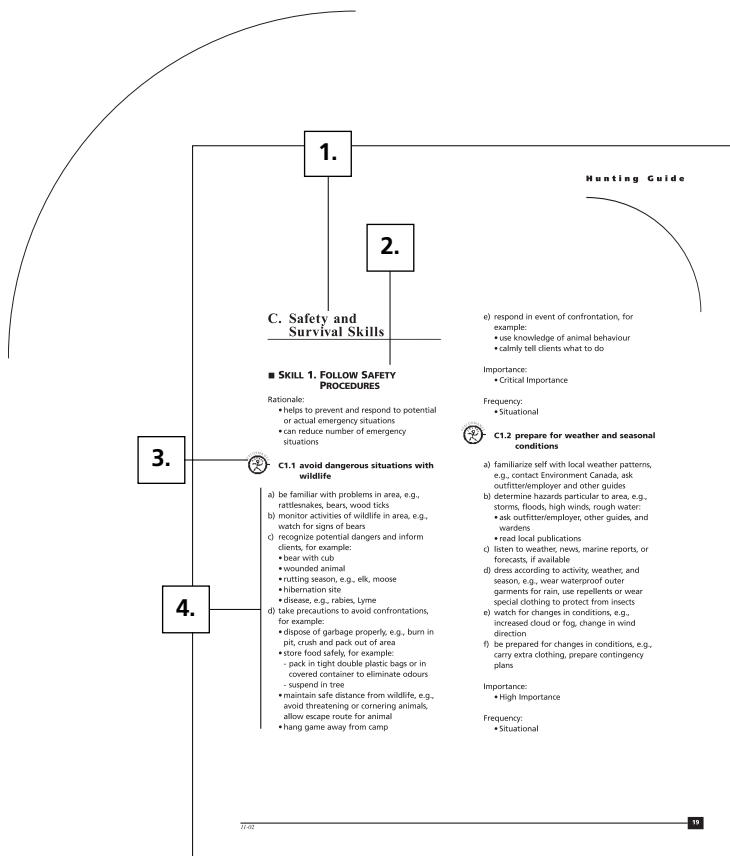
■ *Educators*

- Standards provide the basis for curriculum and program development.
- Standards identify areas where educational expertise is needed and applicable.

■ *Students*

- Standards form the basis of curriculum in tourism programs and facilitate training to accepted industry levels.
- Standards help to promote the tourism sector as a viable and fulfilling career choice.
- Standards clarify career options within the tourism sector.

Supervisory Skills



Notes – Any other information that is required but does not fit into other areas of the standards.

HOW ARE STANDARDS USED?

First, read each standard and determine how it compares with your knowledge and/or the way you currently perform the activity. Determine areas where you need improvement. Then, use a highlighter pen and mark the areas you want to learn and practice. Next, study the knowledge skills and practice the performance skills in the standards. Ask your employer or a peer for assistance, if possible. Obtain other materials to support the standards, for example, books or videos. Finally, check off the activities as you master them.

HOW DO STANDARDS RELATE TO CERTIFICATION?

If industry representatives want a system of professional recognition for their occupation, a certification process is developed. The standards are the basis for the development of the certification tools. The certification process is made up of three steps. Successful completion of a performance review and of a written exam allows the candidate to proceed to the final step, a performance evaluation conducted by an industry evaluator. Upon successful completion, industry professionals receive certificates and pins in recognition.

HOW DOES HOUSE POLICY RELATE TO STANDARDS?

The CTHRC recognizes that an establishment may have internal policies that affect the way in which a skill is performed. The standards provide a general base of information upon which house policies may be built. The knowledge portion of standards should still be learned, as it is the typical generic policy with which professionals should be familiar. By learning or demonstrating an accepted generic standard, professionals gain the advantage of greater job mobility, as well as an appreciation of other ways of accomplishing tasks.

HOW ARE STANDARDS READ?

- 1. Major Category** – identifies a general activity within the occupation.
- 2. Skill** – identifies a general skill within the general activity.
- 3. Subskill** – identifies a specific activity within the general skill. Subskills are defined as either knowledge or performance standards.



Knowledge standards contain information with which you need to be familiar.



Performance standards indicate that the information not only needs to be known, but also performed in order for you to be considered competent in this occupation.

- 4. Why is this important?** – explains why the skill is important
- 5. Details of the Standard** – outline how the subskill can be achieved.
- 6. Contextual Information** – additional information about the subskill, such as:

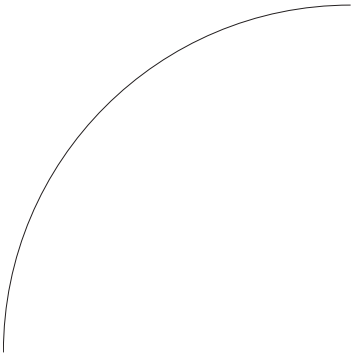
Frequency – A qualitative rating that defines how often the skill is typically performed. All performance skills in this document have been rated as constant.

JOB DEFINITION

The skills outlined in this document describe an entry level management position that reports to another level of management. People in this position are responsible for supervising others, directing customer service, and ensuring that an organization's policies and procedures are implemented.

In this document, the word *organization* refers to the company or business that employs the supervisor.

Supervisory Skills



A. Personal and Professional Skills

■ SKILL 1. BE PROFESSIONAL



1.1 exhibit professional appearance

Why is this skill important?

- to promote positive image of industry, organization, and self
- to help to be good role model
- to generate respect of customers, peers, and staff

- a) dress appropriately, according to organization's policy
- b) maintain personal grooming
- c) maintain good posture

Frequency:

- constant

Variations:

- sometimes personal appearance will require maintenance during working hours, dependent upon working conditions, e.g., at attraction site, maintenance workers may get oil on uniforms during shift:
 - may be supplied with clean uniforms

Conditions (limiting factors):

- accidents on way to work or during working hours may make it difficult or impossible to perform skill:
 - may be supplied with clean and acceptable work attire



1.2 demonstrate professionalism

Why is this skill important?

- to promote positive image of industry, organization, and self
- to help to be good role model
- to generate respect from staff, customers, and co-workers

a) be:

- accountable, e.g., take responsibility for actions
- approachable, e.g., be available to employees and customers
- attentive, e.g., listen to customers and staff and indicate that you have understood them
- confident, e.g., act with assurance, take pride in abilities and accomplishments
- conscientious, e.g., be hard-working
- consistent, e.g., maintain established procedures
- courteous
- dedicated, e.g., be willing to do more than is required
- diplomatic, e.g., explain without offending or belittling, be tactful
- efficient, e.g., use time and resources with care
- empathetic, e.g., show concern for individual's problems
- enthusiastic, e.g., speak positively about product
- even-tempered, e.g., stay calm in stressful situations
- fair, e.g., treat everyone equally and with respect
- flexible, e.g., adapt to unexpected situations
- focused, e.g., stay on task
- friendly, e.g., smile, make eye contact
- innovative, e.g., develop new ideas for products

Supervisory Skills

- knowledgeable, e.g., be able to explain your products and services
 - loyal to organization, staff, and self
 - objective, e.g., be open-minded
 - organized, e.g., use time management system
 - patient, e.g., take time required when training new employees or dealing with customers
 - perceptive, e.g., be aware of what people want and need
 - positive, e.g., smile
 - proactive, e.g., anticipate problems and take steps to prevent them
 - productive, e.g., complete tasks
 - punctual
 - realistic, e.g., ensure that expectations are reasonable
 - service-oriented, e.g., meet or exceed customer's expectations
 - trustworthy, e.g., honour commitments, be honest
- b) set example for employees and industry
 - c) comply with business standards, policies, and procedures
 - d) take pride in abilities and accomplishments of employees and others
 - e) maintain good relationships with customers and suppliers:
 - honour your word
 - provide information as necessary
 - negotiate in good faith
 - f) facilitate communication within organization
 - g) recognize ongoing need for personal and professional development

Frequency:

- constant



1.3 exhibit ethical conduct

Why is this skill important?

- to promote positive image of industry
 - to build trust, respect, and relationships with others
 - to encourage customers to visit organization
 - to help obtain trust of own organization
 - to help avoid liability
- a) support high standards and practices that protect public and bring credibility to organization, industry, and community, for example:
 - implement responsible policies
 - be honest about products or services
 - maintain integrity
 - avoid degrading or malicious discussion
 - b) maintain confidentiality, e.g., discourage gossip in workplace, do not discuss personal information about customers
 - c) respect competitors, e.g., do not criticize competitors' products
 - d) maintain accurate records:
 - keep records secure
 - e) comply with legal requirements, for example:
 - adhere to legislation
 - honour union agreements

Notes:

- should be applied to one's personal as well as professional life

Frequency:

- constant



1.4 participate in professional development activities

Why is this skill important?

- to help to keep current with industry trends, products, and services
 - to promote networking and advancement opportunities
 - to improve own attitude, knowledge, self-confidence, and skills
 - to revitalize and motivate self
- a) conduct self-assessment on current skills, knowledge, and abilities to determine areas needing improvement:
 - review feedback, e.g., from performance reviews
 - seek input from peers
 - b) identify areas of interest where new skill development would be useful, e.g., new products, new techniques being used in industry
 - c) upgrade skills and knowledge, for example:
 - do research on Internet
 - use educational tapes and videos
 - enroll in educational and professional development programs, e.g., online seminars, courses, workshops
 - participate in mentorship programs
 - ask for assistance or instruction
 - read industry publications, newspapers, and books
 - d) participate in local trade and business organizations, e.g., chamber of commerce
 - e) network with industry members, e.g., attend conventions/trade shows
 - f) join and participate in associations
 - g) volunteer
 - h) promote occupation/industry, e.g., get involved in activities that will raise profile of occupation/industry

- i) organize professional development events, e.g., host in-house wine seminar for food and beverage servers

Notes:

- some employers offer incentives for employees who successfully complete professional development activities, e.g., educational assistance programs
- try to take advantage of any offered training or professional development opportunities
- keep accomplishment file to mark progress and keep motivation high

Frequency:

- ongoing

Variations:

- some organizations will have professional development identified as job requirements, e.g., maintain first aid or lifeguard training

Conditions (limiting factors):

- access to resources (e.g., time, money) and availability of training may limit individual's ability to perform skill



1.5 manage time effectively

Why is this skill important?

- to promote ability to complete all duties
 - to allow attention to be focused on customer service
 - to encourage best results possible
 - to support efficiency and productivity
- a) set and prioritize short- and long-term goals:
 - ensure that goals are realistic and relevant

Supervisory Skills

- to staff, department, and organization
- b) outline objectives to be achieved for each goal
 - c) identify tasks that need to be completed for each objective:
 - prioritize tasks according to importance and urgency
 - state performance measures to be used to assess task completion/success
 - determine amount of time each task will take, considering:
 - previous experiences
 - resources available
 - other projects that compete for time
 - possible delays
 - d) use time management system, e.g., day planner, computer, whiteboard:
 - record appointments, meetings, and critical dates
 - e) create action plan:
 - identify timelines and critical dates
 - f) schedule tasks:
 - delegate as required
 - g) monitor progress of tasks and action plan:
 - review and update timelines regularly
 - identify incomplete tasks and make adjustments as required
 - h) review goals and objectives periodically:
 - review time management system
 - evaluate own tasks
 - evaluate progress toward goals
 - make adjustments as required
 - i) balance time spent on operational and planning activities

Notes:

- daily time management activities may be simpler than described:
 - description will be effective strategy for projects or events
- one way to set goals is at three levels:
 - routine, e.g., day to day
 - challenging, e.g., outside comfort zone
 - innovative, e.g., thinking differently, finding new way to do task

Frequency:

- constant

Variations:

- activity may be standardized, e.g., checklists provided with activities to be completed, daily to-do lists
- goals and objectives may be supplied to supervisor

Conditions (limiting factors):

- unplanned situations, including emergencies, and imposed projects and assignments that compete for time may make it difficult to perform skill



1.6 manage stress

Why is this skill important?

- to improve own ability to perform job competently
 - to build harmonious workplace
 - to encourage balance between personal and professional demands
 - to help to be good role model
- a) attend to own personal, physical, emotional, and spiritual needs
 - b) manage time effectively
 - c) maintain sense of humour, e.g., be able to laugh at self
 - d) recognize own limitations:
 - identify personal indicators of stress, e.g., irritability, fatigue
 - e) recognize how own stress affects others
 - f) recognize stress levels in others and how this affects you
 - g) establish comfortable work environment, e.g., encourage open communication
 - h) take action to reduce stress:
 - balance home and work life
 - set realistic goals:
 - revise as required

- know when and how to say no
- ask for assistance, when needed, on temporary or long-term basis, e.g., ask for help stuffing envelopes for mail out, create staff position for three days per week
- delegate tasks whenever possible, e.g., recognize what can be delegated and empower someone else to do tasks
- find healthy ways to relieve stress, e.g., take walks, enjoy hobby

Notes:

- supportive work environment can greatly help supervisor to manage his/her own stress
- each individual deals with stress differently:
 - what works for one person may not work for another
 - managing stress should never involve being destructive or manipulative to self or others
- can be good idea to have trustworthy individuals who will listen to issues and concerns

Frequency:

- as needed

Conditions (limiting factors):

- extreme situations, such as personal events/issues (e.g., death in family) and organizational downsizing, can make it difficult for individual to perform skill

B. Communication Skills

■ SKILL 1. COMMUNICATE EFFECTIVELY



1.1 define effective communication

process of sharing information in timely manner and so that all parties understand each other



1.2 identify components of communication

- a) verbal, for example:
 - vocabulary
 - slang
 - jargon
 - semantics
 - syntax
- b) vocal, for example:
 - tone
 - pitch
 - volume
- c) non-verbal, for example:
 - distance between speaker and listener
 - eye contact
 - facial expressions
 - appearance
 - handshake
 - response time
 - posture
 - gestures
 - silence



1.3 use active listening skills

Why is this skill important?

- to facilitate accurate assessment of customer's needs
- to collect information for decision-making
- to promote co-operative, friendly work environment
- to reduce confusion and error due to misinterpretation
- to show respect for person speaking

- a) determine appropriate time and place to listen
- b) listen carefully to message:
 - give speaker undivided attention
 - be open-minded, e.g., do not jump to conclusions
 - use attentive body language or verbal cues, e.g., face speaker; say, "Yes, I understand."
 - listen until message is completed, e.g., do not interrupt
- c) watch for non-verbal indicators that reinforce or contradict message
- d) respond to message, for example:
 - offer comments
 - use effective questions to seek additional information or clarify details, for example:
 - open questions do not limit answers, e.g., "What do you plan to use it for?"
 - closed questions limit answers to yes, no, or other short responses, e.g., "Will software run on a network?"
 - probing questions ask for more detail, e.g., "When do you need that by?"
 - mirror questions repeat statements as questions for clarification, e.g., "I need that by Monday morning"; mirror question, "So you'll need that by 9:00 a.m., Monday, August 6?"
 - paraphrase to confirm understanding
 - acknowledge message, e.g., thank speaker

Notes:

- it may be useful to take written notes in some situations

Frequency:

- constant



1.4 speak effectively

Why is this skill important?

- to reduce confusion and error due to misinterpretation
- to improve communication with others

- a) identify purpose of message
- b) consider needs and limitations of audience
- c) organize ideas before speaking
- d) determine appropriate time and place to deliver message
- e) determine appropriate format, e.g., formal/informal, group/individual
- f) make final revisions to message
- g) communicate message:
 - be concise
 - speak clearly
 - use proper grammar
 - vary tone, volume, inflection, and rate of speech
 - make eye contact
 - use positive language whenever possible
 - be aware that non-verbal communication may have more impact than verbal communication:
 - send consistent verbal and non-verbal messages, e.g., ensure that facial expression does not contradict what is said
 - respect language preference
- h) be considerate of listener, for example:
 - use humour, if appropriate
 - adjust vocabulary, if necessary, so that listener understands

- use different question types to determine listener's needs
- avoid using slang, jargon, profanity, or sarcasm
- do not be condescending
- consider impact on listener, e.g., time restrictions, emotional impact
- avoid giving too much information at once
- i) confirm understanding:
 - ask for questions and feedback
 - review what was explained
- j) encourage additional questions at later date
- k) answer questions or know where to find answer:
 - follow up

Frequency:

- as needed

Variations:

- depending upon message and audience, process may be formal or informal

- language preference
- e) write first draft:
 - arrange ideas logically
 - be clear and concise
- f) proofread:
 - correct errors
- g) produce final copy and send to recipient:
 - ensure that document is legible, e.g., print clearly
- h) keep copy on file
- i) follow up, e.g., ensure that message was received

Frequency:

- as needed

Variations:

- depending upon document and audience, process may be formal or informal
- for informal document, supervisor may not complete all of steps listed



1.5 write effectively

Why is this skill important?

- to reduce confusion and error due to misinterpretation
 - to improve communication with others
 - to help to produce readable documents for future reference
- a) determine purpose of message
 - b) provide accurate, complete, and concise information
 - c) use format, tone, and style suited to purpose, e.g., memo, business letter, report, e-mail, facsimile
 - d) consider reader's:
 - perceptions
 - reading ability
 - needs
 - technical understanding



1.6 communicate within organization

Why is this skill important?

- to support:
 - consistency of products and services
 - staff morale
 - organization's standards and goals
 - customer satisfaction
 - to help to identify areas for improvement or change
 - to encourage transfer of information (e.g., customer concerns, service issues, shifts) between management, employees, and departments
 - to know who to contact in various circumstances
- a) determine who needs information
 - b) identify best method to communicate information, for example:
 - logbook

Supervisory Skills

- meetings
 - face-to-face discussions
 - memoranda
- c) communicate using best method to reach intended recipients, e.g., does everyone have e-mail?
- d) check in-house communication tools frequently, e.g., e-mail, bulletin boards, logbook, in-basket, newsletter
- e) communicate with management:
- determine information that manager is seeking
 - ask for clarification, if necessary
 - tailor communication style to audience, e.g., if manager likes details, provide details
- f) communicate with staff:
- tailor communication to audience, when possible
 - try to involve staff in decision-making process to promote acceptance

Notes:

- while away from workplace, follow policy to notify others of your absence:
 - update self on information missed upon your return
- if someone is covering your responsibilities in your absence, give them adequate information

Frequency:

- as needed

■ SKILL 2. USE COMMUNICATION TOOLS



2.1 use telephone

Why is this skill important?

- to help create positive first impressions
- to support positive business image
- to facilitate customer service
- to encourage business communications

a) when answering call:

- answer promptly, e.g., within three rings
- speak clearly and pleasantly, e.g., pretend you are face-to-face with caller:
 - smile, as this translates into pleasant voice
- identify organization and self
- greet caller, using name if known
- determine needs of caller
- provide requested information
- ask for permission before putting caller on hold
- thank caller for holding
- if information or party is not readily accessible:
 - follow up, for example:
 - > locate information or party promptly and return to call
 - > transfer call to someone who can help:
 - ~ advise caller that you are transferring call, to whom you are transferring, and to what number you are transferring
 - ~ notify receiver of nature of call before transferring
 - > inform caller that information/party is unavailable
 - > ask if caller wishes to leave message
- focus on call, e.g., do not do other tasks, give call your full attention

b) when taking message:

- record:
 - caller's name and telephone number (including area code)

- correct pronunciation and spelling of caller's name
- name of person to whom caller wishes to speak
- message
- date and time of call
- best time to call back
- verify information by repeating details back to caller
- initial or sign message
- thank caller
- send message to appropriate person, department, or facility
- c) when making call:
 - identify self and organization
 - state purpose of call
 - be prepared to leave message, if necessary, e.g., know what information you require
- d) when leaving message:
 - speak slowly and clearly
 - leave name, organization name, telephone number, and message:
 - include date, time, and complete information
 - spell difficult or confusing names

Notes:

- good idea to have standard policy regarding allowable time to return calls, e.g., within 48 hours

Frequency:

- as needed

- to help provide information about your availability
- to improve productivity

- a) read operating instructions:
 - familiarize self with all features
- b) record announcement:
 - keep message complete, concise, and professional
 - play back message to ensure clarity
 - update announcements as required:
 - during extended absences, ensure that message includes when you will return and who to contact while you are away
- c) check answering machine/voice mail frequently for incoming messages:
 - respond to messages as soon as possible
 - ensure that all messages are returned

Notes:

- important tool, helping to keep you up to date even when not at your desk

Frequency:

- as needed

Conditions (limiting factors):

- some organizations or supervisors may not have access to this equipment/service



2.2 use answering machine/voice mail

Why is this skill important?

- to help create positive first impressions
- to support positive business image
- to improve communication with customers/suppliers
- to help others to contact you confidentially while you are away



2.3 use facsimile (fax) machine

Why is this skill important?

- to allow quick transfer of written information
- to provide documentation of communication

- a) clearly indicate on front page:
 - sender
 - receiver
 - telephone and facsimile numbers of both sender and receiver, including area codes

Supervisory Skills

- number of pages being sent
- contact person, if different than sender
- b) give incoming facsimiles to intended parties in timely manner:
 - keep incoming facsimiles confidential
- c) file confirmation reports

Frequency:

- as needed

Variations:

- in larger organizations, supervisors may delegate task

Conditions (limiting factors):

- some organizations or supervisors may not have access to this equipment

extended periods, if available:

- identify alternate contact person in reply message

Frequency:

- ongoing

Conditions (limiting factors):

- unreliable Internet access or no Internet access will make skill difficult or impossible to perform



2.4 use electronic mail (e-mail)

Why is this skill important?

- to allow quick transfer of written information
 - to document communication
 - to communicate effectively at low cost
 - to improve productivity
- a) check for messages regularly:
 - respond promptly, when necessary
 - b) protect computer system from viruses and junk mail:
 - use up-to-date virus protection programs
 - turn off auto-preview
 - scan transferred files prior to downloading to protect computer from viruses
 - c) secure system, e.g., use passwords, change passwords frequently, remember to log off when leaving terminal
 - d) indicate purpose of message on subject line
 - e) keep message clear, concise, and professional, e.g., do not use all capital letters
 - f) keep files organized and current
 - g) use out-of-office reply when away for

C. Leadership Skills

■ SKILL 1. BE A LEADER



1.1 define a leader

someone who:

- a) demonstrates professionalism
- b) communicates own and organization's vision and values
- c) guides, inspires, and empowers others
- d) is:
 - able to evaluate progress
 - compassionate
 - decisive
 - responsible
- e) leads by example
- f) praises others publicly when appropriate and gives constructive criticism privately when necessary
- g) takes initiative, e.g., helps staff during busy periods; considers all tasks part of own job, when necessary



1.2 facilitate change

Why is this skill important?

- to promote growth of organization
- to improve viability of organization in changing business environment

- a) recognize opportunities for, and anticipate, change:
 - be aware of:
 - industry trends
 - government policies and political climate
 - current affairs
 - new technology
- b) understand change, e.g., reason for change,

- impact of change, extent of change
- c) assess situation
- d) identify opportunities, e.g., best timing or appropriate times to make change
- e) prepare for change, e.g., communicate to staff, provide training, anticipate possible problems or barriers
- f) implement change
- g) evaluate response to change
- h) follow up

Notes:

- good idea to involve everyone (e.g., supervisors, employees) in process of facilitating change:
 - this may take more time, but will create less resistance
- regular, informal meetings between management and supervisors can help to identify need for and implementation of change

Frequency:

- as needed

Variations:

- in some organizations, facilitating change will be collaborative process between management and supervisors

Conditions (limiting factors):

- resistance to change can make skill difficult to perform
- lack of resources (e.g., time, money) can make this skill difficult to perform



1.3 delegate tasks effectively

Why is this skill important?

- to help maintain productivity levels
- to share workload
- to give employees chance to develop skills
- to help manage time effectively
- to build team spirit

Supervisory Skills

- to allow staff ownership of tasks

- determine tasks and responsibilities to be delegated
- ensure that individual's skills and interests match position and assignment
- consider employee's ability to fit tasks into workload
- communicate expectations clearly:
 - outline requirements and timelines
 - invite questions
 - confirm understanding
- get individual's commitment to expectations
- empower individual to complete task or responsibility:
 - provide training, time, resources, and budget required, as necessary
- periodically check task in progress, e.g., ask for feedback, offer suggestions
- ensure that task is completed as required
- recognize successful completion of task, e.g., thank employee appropriately

Frequency:

- as needed

Variations:

- if working in large organization, it may be possible to seek assistance from other areas

Conditions (limiting factors):

- limited number of available employees to delegate to can affect supervisor's ability to perform skill



1.4 define teamwork

collaborative effort of group toward common goal while recognizing individual strengths and limitations



1.5 promote teamwork

Why is this skill important?

- to inspire individuals to achieve goals
- to promote good working environment
- to allow employees to enhance skills
- to maintain or improve productivity
- to improve morale

- be role model by demonstrating correct skills and positive attitude
- establish open lines of communication between all team members:
 - communicate information that employees need in timely manner
 - seek feedback:
 - be receptive to employees' input
 - tell employees what became of input
- create atmosphere of teamwork:
 - recognize individual differences, e.g., strengths, limitations
 - encourage respect, co-operation, and participation
- be active member of team

Notes:

- if possible, have staff day away from workplace
- do fun team building exercises or activities to help you and your co-workers learn about each other:
 - helps to build more positive team

Frequency:

- ongoing

Conditions (limiting factors):

- personality conflicts can make skill difficult to perform



1.6 promote positive attitude

Why is this skill important?

- to encourage good working environment
 - to reduce stress levels
 - to set tone for team
 - to motivate staff
- a) feel good about self and others
 - b) be open to new ideas
 - c) maintain friendships and business contacts
 - d) communicate effectively
 - e) create positive experiences for customers and staff
 - f) take pride in what you do and who you are

Notes:

- supervisors have a responsibility to be role models and ambassadors to own teams and organization

Frequency:

- constant

Conditions (limiting factors):

- underlying personal problems, disciplinary situations, and unexpected events/emergencies can make skill difficult to perform



1.7 motivate employees

Why is this skill important?

- to increase morale and productivity
 - to promote positive attitude toward job
 - to build positive working environment
 - to promote excellent experience for customers
 - to reduce absenteeism
 - to improve staff retention
- a) establish positive working environment:
 - encourage sharing of knowledge, e.g.,

through staff meetings, e-mails, or newsletters

- prevent/solve problems before they escalate
- b) identify what motivates each employee, e.g., recognition, promotions, bonuses, new or challenging tasks
 - c) determine individual's strengths and weaknesses, e.g., ask employee, observe employee, review performance evaluations
 - d) set achievable, measurable, and challenging goals
 - e) provide employees with tools and training needed to perform tasks
 - f) monitor performance and respond appropriately, for example:
 - use positive reinforcement, e.g., pass on compliments, thank others for good work
 - provide constructive feedback
 - offer assistance when needed
 - celebrate successes
 - g) monitor morale levels:
 - watch for symptoms of low morale, e.g., absenteeism, poor performance
 - h) involve employees in decision-making processes, if possible:
 - ask for and give credit for suggestions

Notes:

- create opportunities for staff input
- allow staff to learn from mistakes and successes

Frequency:

- constant

Conditions (limiting factors):

- management's limitations on incentives can affect individual's ability to perform skill
- time pressures can make having time to motivate employees difficult

Supervisory Skills



1.8 make decisions

Why is this skill important?

- to support customer service levels and productivity
- to encourage issues to be dealt with effectively
- to generate respect of customers, peers, and staff
- to demonstrate leadership and consistency

a) identify issues:

- review available information:
 - obtain additional information, if necessary, e.g., consult appropriate sources
 - refer to precedents, if applicable

b) assess time constraints

c) identify effects on other areas of organization

d) identify possible solutions to issue

e) evaluate consequences of each solution

f) select best solution:

- determine second best solution as contingency

g) implement solution in timely manner

h) evaluate solution, if necessary

i) document:

- details of issue
- action taken
- results

Notes:

- good idea to include other team members (e.g., supervisors, employees) in process for important decisions, as it encourages commitment
- decisions often need to be made quickly to avoid disrupting service levels or work environment

Frequency:

- as needed

Conditions (limiting factors):

- lack of management support and access to information and resources can make it difficult to perform skill



1.9 solve problems

Why is this skill important?

- to support customer service levels and productivity
- to encourage solutions to issues faced by employees or customers
- to lead by example
- to reduce stress levels

a) define problem:

- gather facts

b) assess severity of problem by determining:

- effect on customers, employees, and self
- effect on organization's image
- long-term impact
- public perception
- safety hazards

c) think creatively, for example:

- find innovative solutions to problems
- generate new ideas through brainstorming
- try new approach to recurring problem

d) use calm, professional approach

e) decide on course of action in timely fashion

f) implement solution

g) evaluate solution

h) document:

- details of issue
- action taken
- results

i) report to management, if necessary

Notes:

- important to realize that solution to problem may need to be applied consistently, e.g., if solution is applied to one employee in situation, it will need to be applied to another employee in same situation:
 - avoids creating resentment and negative work environment

- team members' input may be needed to effectively solve some problems
- if resolution of problem is beyond supervisor's authority, refer to management or other authority immediately
- problem and solution may need to be communicated to everyone to allow them to be proactive in avoiding problem in future

Frequency:

- as needed

Conditions (limiting factors):

- lack of management support and access to information and resources can make it difficult to perform skill

D. Human Resource Management Skills

■ SKILL 1. RECRUIT AND HIRE EMPLOYEES



1.1 participate in reviewing/updating job descriptions

Why is this skill important?

- to help meet emerging customer and organizational needs
 - to promote job descriptions that reflect organizational standards
 - to help clarify roles and responsibilities of positions
- a) seek input from employees about current duties and responsibilities, e.g., talk with staff
- b) review documentation as required, for example:
- labour legislation and employment standards
 - trade publications for industry standards and technology trends
 - customer feedback, e.g., comment cards, surveys
 - organizational structure, e.g., organizational chart
 - existing job descriptions
 - comments from exit interviews and performance evaluations
- c) document job requirements, for example:
- general duties
 - specific tasks
 - reporting structure
 - tools/materials/equipment used
 - qualifications, e.g., certification, industry experience, education
 - hours of work and terms of employment, e.g., shifts, overtime

Supervisory Skills

- special conditions/requirements, for example:
 - isolation
 - travel
 - physical requirements, e.g., must be able to lift 15 kg packages
 - environment
 - bondable
 - language requirements, e.g., must be bilingual
 - driver abstract, i.e., driving record
- performance expectations

Notes:

- growing trend to include employees in this process in significant way, e.g., hold focus group to discuss position:
 - produces employee investment into changes taking place in human resource practices

Frequency:

- as needed

Variations:

- depending upon organization, this may be management's task, but supervisors will usually be asked for input



1.2 assist in recruiting employees

Why is this skill important?

- to help develop good working team by identifying high quality potential staff
- to help meet current human resource needs of organization
- to build ownership in recruitment process

- a) suggest method for recruiting employees, for example:
- promote within organization
 - seek referrals through industry networking
 - participate in work education programs

- review applications on file
 - place advertisements, e.g., through newspaper, on electronic labour exchange (ELE), in schools
 - contact employment centres
 - contact seasonal employees for possible re-hire
 - hire employment agency
- b) assist in designing employment advertisements, if required, including:
- accurate job title/description, if applicable
 - hiring criteria, e.g., minimum qualifications
 - how to apply, e.g., send résumé by mail before October 1st
- c) assist in screening applications:
- compare qualifications to job description
- d) select applicants who best meet qualifications:
- be able to justify selections based on objective criteria

Notes:

- could save time and resources by checking references during pre-screening process
- can be good idea to conduct pre-screening telephone interview, asking questions about availability and shift work:
 - particularly important if person is applying for position that involves telephone or language skills, e.g., reservations, call centre

Frequency:

- as needed

Variations:

- complexity of recruitment and interview process will depend upon position that needs to be filled, e.g., position that is more technical or has higher levels of responsibility may require more strenuous recruitment and hiring process
- skill may be handled by human resource department in larger organizations

Conditions (limiting factors):

- in some workplaces, union agreements or management decisions will limit supervisor's ability to perform skill



1.3 interview applicants

Why is this skill important?

- to help choose right candidate for position
- to allow potential employees to determine if job is right for them
- to allow supervisor and applicant to get to know one another before making commitment
- to present organizational ideals and concepts to potential employees

a) prepare for interview, for example:

- develop questions for interview, if applicable
- use consistent interview sheet, e.g., interview form or guide
- determine interview format, e.g., personal, group/panel
- review applicants' applications or résumés
- select private location
- schedule applicants:
 - allow ample time between interviews to make notes on previous interview and/or to relax momentarily:
 - >also allows next interview to proceed on time, should previous interview have gone overtime
- assemble necessary documents, information, and personnel, e.g., job description, interview form, salary, benefit package details, other interviewers

b) conduct interview:

- be punctual
- greet applicant:
 - put him/her at ease
- introduce self, e.g., name, responsibility

- ask applicant what he/she knows about organization
 - gain insight into applicant's personality, abilities, and skills, e.g., discuss information on application form/résumé
 - ask about:
 - strengths and areas for improvement
 - short- and long-range goals
 - review job description/expectations
 - test skills, where applicable
 - ensure that applicant:
 - is legally allowed to work
 - is aware of work-related environment, e.g., business volume, seasonality, size of team
 - understands requirements of position, e.g., tools, vehicle, computer, physical demands
 - provide overview of organization and position, e.g., type of organization, brief history
 - invite applicant to ask questions about organization or position
 - explain other factors, e.g., isolation, live-in, social atmosphere
 - seek commitment for term required
 - request reference list, if necessary
 - discuss monetary package, e.g., salary/pay scale, union dues
 - explain selection process, e.g., date of notification
 - thank applicant
- c) record comments and ratings on interview form:
- ensure that comments are objective and professional

Notes:

- for some positions, panel interview will be appropriate and will alter tasks

Frequency:

- as needed

Supervisory Skills

Variations:

- length of interview will be dependent upon position applied for
- style of interview questions and number of interviews may be set by organization
- interview may be broken down into parts when hiring large number of staff at one time, e.g., screening interview, skills interview, attitude/personality interview



1.4 select final candidate

Why is this skill important?

- to help ensure that organizational needs are met
- to improve overall performance of team and organization

- refer to comments and ratings from interview forms
- rank candidates:
 - consult with members of interview team, if applicable
- contact references to verify information, for example:
 - past performance, e.g., reliability, including attendance
 - dates of previous employment
 - education/qualifications and other relevant information
 - why candidate left job
 - candidate's working relationship with other team members
 - whether candidate would be rehired
- record information supplied by references with discretion
- test candidate's skills, if applicable, e.g., have candidate prepare food in kitchen
- select most suitable candidate and alternates
- notify unsuccessful applicants, e.g., telephone, send letter

Notes:

- candidates may be better suited for another position in organization; consider offering another position, if appropriate

Frequency:

- as needed



1.5 make job offer

Why is this skill important?

- to review expectations
- to fill organizational needs
- to help avoid liability

- contact most suitable candidate:
 - confirm conditions of employment, for example:
 - commencement date
 - training program
 - probationary period
 - salary
 - benefit package
 - performance review
 - holidays and vacation time
 - confidentiality
 - terms of employment
 - union agreements
 - work schedule
- offer position, allowing reasonable time frame for response:
 - if candidate declines:
 - determine reason
 - revise offer, if appropriate, or contact alternate candidate
 - if candidate accepts:
 - provide written offer of employment, including conditions and start date
 - request candidate's signature
 - place copy of written offer of employment and any other documentation in personnel file
- notify unsuccessful candidates, if necessary:
 - express thanks for application

- provide developmental feedback for all unsuccessful internal applicants:
 - can help them acquire required skills to fill future positions

Notes:

- ask applicant if he/she has prior commitments or plans that might affect scheduling, e.g., vacations, special occasions

Frequency:

- as needed

Variations:

- in larger operations, human resource department or manager may be making job offers

- breaks
- pay periods
- job description and performance expectations
- union agreement, if applicable
- b) welcome employee to organization
- c) encourage questions
- d) tour facility and work areas:
 - introduce employees
 - identify locations of amenities, e.g., washrooms, lunchroom
 - explain emergency procedures
 - identify safety equipment and Workers' Compensation Board (WCB) reporting procedures
- e) describe job responsibilities and performance expectations, for example:
 - review product standards
 - discuss applicable legislation
 - provide manuals for operating equipment
- f) finalize employment documentation:
 - provide copy of union contract, if applicable
- g) follow up soon after employee begins work:
 - seek feedback about orientation session

Notes:

- incorporate viewing of organization's Web site during orientation:
 - good idea because new employees will access company information that many customers will see
 - employees that do not have access to Internet might not otherwise have opportunity to access this information
- introduce new employees to products offered to customers, e.g., have lunch in restaurant

Frequency:

- as needed

Variations:

- in some organizations, employee documentation may be finalized before orientation



1.6 conduct orientation session for employees

Why is this skill important?

- to help new employees to feel welcome
- to allow new employees to become knowledgeable about organization, including philosophy, goals, services, and facilities
- to allow new employees to view entire product that organization offers

- a) schedule adequate time to conduct orientation session and to provide information about organization, for example:
- authority and reporting structure
 - goals and objectives
 - history
 - mission statement
 - organizational structure
 - philosophy
 - policies and procedures, for example:
 - disciplinary process

Supervisory Skills

- in larger organizations, all or part of skill may be performed by human resource department
- some organizations may have job shadowing or mentoring programs that help to orient new employees to job functions
- initial orientation session may be very specific or very general, depending on who is attending, e.g., individuals from different departments
- identify employees' strengths and areas needing improvement, e.g., develop training checklist for each employee

- b) prioritize training needs
- c) research current training trends and available training
- d) review budget:
 - review options available, e.g., professional seminars, private trainers, occupational standards, in-house programs:
 - consider cost, length, and quality of options
- e) consider individual learning styles and obstacles to learning
- f) adapt training programs/materials as needed
- g) finalize details of training sessions, for example:
 - session content
 - participants, e.g., arrange for other employees to cover for participants in training, if necessary
 - date, time, and location
 - training tools required, e.g., videos, flip charts
 - instructors
- h) prepare agenda
- i) inform participants of details
- j) communicate expectations, e.g., participants should share knowledge with co-workers after training

■ SKILL 2. CONDUCT TRAINING



2.1 plan training for employees

Why is this skill important?

- to represent organization in professional manner
 - to set clear learning expectations for employees
 - to help protect organization's investment by focusing training in priority areas
 - to take organized, efficient approach to training
 - to assist employees in improving skills and knowledge
 - to set standards for employee performance
- a) determine training needs of employees, for example:
 - review job descriptions
 - consider training needs required:
 - by legislation
 - for job development
 - for new employees
 - by changes in workplace, e.g., new computer software
 - invite employee input
 - review common customer complaints and how to resolve/avoid them
 - review problems encountered in previous training

Frequency:

- as needed

Variations:

- in larger organizations, portion of skill may be done by human resource department, but supervisor is still responsible for helping to identify and prioritize training needs



2.2 conduct training session

Why is this skill important?

- to help ensure that all staff are informed, knowledgeable, and efficient
- to support and increase customer service levels
- to share skills and knowledge and provide opportunities for practice
- to set standards for success and performance

a) establish learning environment:

- put participants at ease

b) follow training session plan, for example:

- review agenda and housekeeping details
 - explain:
 - training objectives and rationale
 - importance of meeting or exceeding industry standards
 - knowledge and skills to be learned
 - ask about expectations:
 - address concerns and misconceptions
 - adjust session to encompass expectations, considering:
 - >time available
 - >goals of session
 - deliver training, e.g., instruct, demonstrate
 - provide:
 - opportunity for practice
 - feedback to participants
 - extra help for special-needs participants, e.g., translator for second language participant, assistant for low-literacy participant
- c) encourage questions and participation throughout session
- d) ensure that participants understand new concepts or skills, for example:
- test skills or knowledge
 - present material in another way, if necessary
 - pose problems for participant to solve

- ask employee to sign document to acknowledge that training was understood
- e) recognize successful completion of training, e.g., present certificates, acknowledge participants in newsletter
- f) evaluate training program:
- seek feedback from participants about program, trainer, and resources
 - compare results with expectations
- g) follow up, for example:
- record and file attendance
 - record and file observations, e.g., both positive and negative
 - respond to feedback
 - revise training session as necessary
 - update personnel files
 - ask employees to sign acknowledgement of receipt of training
- h) measure impact, e.g., increased sales, reduced injuries
- i) review results of training and training methods

Notes:

- different individuals learn in different ways, e.g., audio, visual, kinesthetic

Frequency:

- as needed

Variations:

- group training sessions may be conducted regularly (e.g., three times per year) in large organizations

Conditions (limiting factors):

- shift work (e.g., night auditors on front desk) can make it difficult to schedule training
- lack of resources (e.g., time, money) can make it difficult to perform skill on regular basis



2.3 define coaching and mentoring

- a) coaching:
 - usually involves teaching or correcting specific technique
 - helps employee meet short-term goals
 - occurs at job site, often spontaneously
- b) mentoring:
 - helps employee achieve long-term learning or professional development goals
 - involves exchange of ideas and facilitating learning activities outside of organization
 - involves coaching skills in more formal and long-term approach



2.4 coach employees

Why is this skill important?

- to establish climate of continuous learning and improvement
- to help empower employees
- to improve job performance, workplace relationships, and operation
- to provide immediate, non-threatening feedback to employees

- a) ensure that employees know what is expected of them
- b) be prepared to demonstrate task as it should be performed
- c) involve employee as much as possible in learning process:
 - try to involve all five senses
- d) identify situation or problem that needs to be solved
- e) do not criticize, or draw conclusions for employee
- f) use positive approach to help employee discover solutions to problem:
 - ask questions to help employee focus on issue, e.g., ask which alternative is likely to work best

- g) give employee chance to achieve small victories and gain self-confidence, e.g., break larger tasks into small learning activities:
 - celebrate successes, e.g., give praise specific to task
- h) encourage and guide employee on specific task until success is achieved

Notes:

- use coaching with all employees, not just new employees

Frequency:

- ongoing

Variations:

- extent to which supervisor will be expected to coach employees may vary with workplace

■ SKILL 3. MANAGE EMPLOYEE PERFORMANCE



3.1 prepare for performance review

Why is this skill important?

- to show respect for employees
 - to present self in professional manner during performance review
 - to have accurate information for performance review
 - to identify gaps and suggestions for improvement
- a) use standard format in order to be consistent and objective
 - b) review procedure and criteria with employees
 - c) seek input from other supervisors and management
 - d) review documentation, including personnel file and customers' comments

- e) prepare notes
- f) set mutually-acceptable date and time for review:
 - before end of probationary period for new employees
 - according to organization's policy for all other employees

Notes:

- having employee complete a self-assessment can be useful exercise to help him/her prepare for performance review

Frequency:

- performed at end of or during probationary period, e.g., three or six months
- performed annually on formal basis:
 - sometimes informal review will be given more frequently, e.g., quarterly

Variations:

- in some organizations, may not be supervisor's duty

- b) greet employee:
 - put employee at ease
- c) start and end with positive feedback
- d) ask for written or verbal self-evaluation
- e) compare performance to established criteria
- f) provide feedback on skills, knowledge, and attitude:
 - use specific examples of behaviour
 - give legitimate reasons for any negative feedback
 - avoid non-job related issues, e.g., personality
- g) offer recommendations for improvement:
 - ask employee for input
- h) reach agreement on goals and time frames, for example:
 - goals of employee within organization
 - success targets of organization, e.g., sales volume, number of customers
- i) discuss career expectations and future plans of employee
- j) invite feedback on policies and procedures that affect performance
- k) follow up:
 - implement incentive and training programs, if applicable
 - document performance review:
 - have employee sign it
 - provide copy to employee
 - file performance review
 - update job description, if necessary
 - set date for next review
 - monitor progress

Notes:

- when possible, have two supervisors/managers conducting performance review
- employee should be aware of any performance issues prior to review:
 - performance issues should be addressed as they occur
- do not base entire performance review on single incident in past:
 - guideline is to base 20% of evaluation on past performance and 80% on future direction for growth



3.2 conduct performance review

Why is this skill important?

- to improve work processes, staff skills, and organization
 - to provide opportunity for open communication
 - to align employee performance with objectives of organization
 - to give direction for future improvement
 - to establish mutually-agreeable expectations for performance, goals, and objectives for employees
- a) select comfortable location away from distractions:
 - prevent interruptions during review, e.g., engage *do not disturb* function on telephone

Supervisory Skills

Frequency:

- performed at end of or during probationary period, e.g., three or six months
- performed annually on formal basis:
 - sometimes informal review will be given more frequently, e.g., quarterly

Variations:

- in some organizations, human resources department will set date for next review
- in some organizations, performance review includes opportunity for employee to provide feedback on supervisor's performance and organization in general



3.3 encourage ongoing professional development

Why is this skill important?

- to improve morale and self-confidence of employees
 - to retain employees' loyalty by investing in their futures
 - to create positive working environment
 - to encourage employees' personal progress and growth
 - to prepare knowledgeable employees for present and future needs of organization and industry
- a) consider abilities and goals of employees
 - b) recognize potential in employees:
 - delegate new responsibilities, considering workload and skills
 - provide opportunities for advancement, if possible
 - make recommendations to management
 - c) provide:
 - career guidance
 - coaching/mentoring
 - training opportunities, e.g., supplier-provided training, apprenticeship, industry-related training, certification

d) identify and access funding and support available

Frequency:

- ongoing

Conditions (limiting factors):

- budget constraints can limit performance of skill



3.4 address performance problems

Why is this skill important?

- to improve working environment, including occupational health and safety
 - to help avoid more complex problems in future
 - to reduce customer service issues
 - to help employees improve performance
 - to support or improve productivity
 - to create learning experience
- a) determine nature of problem:
 - locate source of problem, e.g., training, performance, or behavioural deficiency; outside barrier; interpersonal difficulties with other staff or supervisors
 - b) determine impact on others
 - c) follow legislation, organization's policies, and union agreements
 - d) discuss problem with employee privately:
 - have appropriate witness present, if required
 - e) focus on issues, not personality, e.g., say, "This is what happened"; do not say, "You are ..."
 - f) collaborate on ways to resolve problem:
 - assist, if possible, or refer employee to appropriate resource, e.g., support group
 - g) state required changes and set time frame:
 - outline consequences of non-compliance

- h) for major infractions, sign and have employee and union representative (if applicable) sign document:
 - give copy to employee
- i) monitor employee's performance to ensure that problem is resolved within set time frame:
 - increase observation, e.g., enlist assistance from other supervisors
 - provide feedback to employee and employer:
 - recognize progress, e.g., give praise in public
- j) document details in employee file, for example:
 - date
 - behaviour change requested
 - consequences outlined
- k) if problem continues, consult with management, human resource department, and/or union to determine appropriate consequences

Frequency:

- as needed

Variations:

- some organizations are required to complete specific documentation procedures, e.g., union environment

- a) be aware of legislation and collective agreements governing dismissal:
 - be aware of potential allegation of wrongful dismissal
 - seek legal advice, if required
 - confer with management or human resources department, if required
 - adhere to contractual obligations
- b) consider timing and impact on individual and organization, e.g., do not dismiss immediately before time off
- c) be prepared:
 - plan what to say
 - ensure that reasons are documented
- d) advise employee of dismissal in private:
 - have witness present
 - provide reasons for dismissal
 - provide copies of documentation, if required, for example:
 - written warnings
 - organization's policy
 - performance appraisals
 - provide record of employment as required by law
 - provide details of compensation and benefits, if applicable, e.g., holiday pay, group insurance
 - provide counselling, if applicable
- e) process dismissal immediately
- f) take security measures, if necessary, for example:
 - ensure that employee pays outstanding accounts
 - collect property belonging to organization, for example:
 - picture identification
 - keys and passes
 - uniform
 - credit cards
 - purchase orders
 - equipment, e.g., computer, tools
 - arrange for employee to be escorted from premises
 - change access and security codes



3.5 dismiss employees

Why is this skill important?

- to help maintain customer service levels
- to help maintain productivity and morale
- to follow legal requirements
- to handle difficult situations
- to help protect staff and organization's assets

Supervisory Skills

- g) follow up, for example:
- discreetly notify others who may be affected, e.g., payroll department, customers, co-workers, suppliers
 - complete all documentation for personnel file:
 - keep for future reference
 - forward personal property
 - update schedule, if necessary

Frequency:

- as needed

Variations:

- in some organizations, supervisor will not be responsible for this skill

Conditions (limiting factors):

- due to collective agreements in some unionized work environments, supervisors cannot dismiss employees



3.6 lay off employees

Why is this skill important?

- to support good relations with employees that might be rehired
- to help ensure that organization's financial needs are met, e.g., to reduce labour costs during slow periods
- to help ensure that sensitive situations are dealt with effectively
- to allow legal requirements to be met

- a) be aware of legislation and collective agreements governing layoffs
- b) consider timing and impact on individual and organization
- c) advise employee of layoff in private:
- consider having witness present
 - state:
 - reason for layoff
 - effective date

- provide written notice
- d) offer assistance, if applicable, e.g., provide letter of reference or counselling
- e) conduct exit interview:
- ask for feedback about:
 - organization
 - position
 - discuss possibility of recalling
- f) ensure that employee returns property belonging to organization
- g) follow up, for example:
- provide separation documents
 - notify others who may be affected, e.g., payroll department, customers, co-workers, suppliers
 - complete personnel file:
 - keep for future reference
 - change access and security codes
 - update schedule
 - consider making changes to organization based on feedback from exit interview

Notes:

- can sometimes be less expensive to retrain employee for another area than to lay off staff and later recruit and train new staff
- maintaining good relations with laid off employees can reduce costs overall, because it is less expensive to retain knowledgeable employees than to recruit and retrain new employees

Frequency:

- as needed

Variations:

- exit interview may not take place, depending on organization's policy



3.7 process resignations

Why is this skill important?

- to encourage organizational and legal requirements to be met
- to help understand reasons for resignations
- to help make appropriate adjustments within organization

- a) acknowledge written resignation
- b) conduct exit interview:
 - set date and time for interview, if required
 - determine reason for resignation
 - acknowledge contributions
 - obtain feedback regarding organization and position:
 - ask for suggestions for improvement
 - discuss possibility of rehiring
 - document interview
- c) accept resignation or refer to manager for possible renegotiation
- d) follow up, for example:
 - ensure that employee returns property belonging to organization
 - provide separation documents
 - complete personnel file:
 - keep for future reference
 - update schedule
 - notify others who may be affected, e.g., suppliers, co-workers
 - change access and security codes
 - consider making changes within organization based on feedback from exit interview, e.g., process improvements

Frequency:

- as needed

Variations:

- human resource department or manager may conduct exit interview

■ SKILL 4. MAINTAIN PERSONNEL FILES



4.1 maintain personnel files

Why is this skill important?

- to help meet legislation requirements
- to support information needed for:
 - processing payroll
 - tracking employee history, e.g., performance reviews, hours worked
 - internal promotions
 - career development
- to limit liability concerns, for example, files can:
 - prove training has occurred
 - prove reprimand has occurred
 - establish grounds for dismissal
 - support record of employment
 - provide basis for referrals and references

a) collect pertinent documents, for example:

- accreditation, e.g., certificates, degrees, licences, diplomas
- application form/résumé
- benefit plan, e.g., medical, dental
- commendation/complaint letters
- confirmation of employment letter
- emergency contact information:
 - name
 - telephone number
- employee's signature signifying acceptance of policies
- exit interview notes
- interview form with comments
- notation of vacation/sick time taken or owed
- payroll/tax forms
- performance reviews
- records of disciplinary actions, e.g., letters, warnings
- training records

b) update active files as required

c) keep personnel files secure:

- maintain confidentiality at all times

Supervisory Skills

- d) retain files as required by policy and legislation

Notes:

- many records are now being kept only in electronic form
- access to personnel files is restricted by law
- files may also contain feedback from customers, e.g., comment cards

Frequency:

- as needed

Variations:

- some organizations keep some records (e.g., payroll, sick time) in electronic form and other records (e.g., training files, disciplinary action) in paper form

E. Operational Skills

■ SKILL 1. SUPERVISE EMPLOYEES



1.1 manage diversity in workplace

Why is this skill important?

- to help meet legal obligations
- to improve individual productivity
- to improve competitive edge
- to introduce new ideas and perspectives
- to improve organization's image

- a) understand that all people are equal and have same rights and responsibilities, regardless of:
- race
 - religious belief
 - colour
 - gender
 - sexual orientation
 - physical disability
 - mental disability
 - age
 - ancestry
 - place of origin
 - marital status
 - source of income
 - family status
- b) value diversity:
- be open-minded
 - avoid bias or prejudice
- c) gain knowledge or understanding of individuals with differences
- d) teach others to accept/understand diversity
- e) identify and adapt to learning styles of those you supervise
- f) provide fair and equitable opportunities for employees to achieve personal goals and reach potential:
- be sensitive to culture and needs of employees, e.g., schedule around religious

days, if possible
g) do not tolerate harassment in workplace

Frequency:
• ongoing

Variations:
• provincial/territorial legislation affects application of skill



1.2 schedule employees

Why is this skill important?

- to help ensure that customer service levels are maintained
- to help keep costs in line with budget guidelines
- to reduce over- or under-staffing
- to support positive morale levels

- a) communicate policies and procedures about scheduling, for example:
 - when schedule is posted
 - time off
 - changing shifts
 - overtime
 - union agreements, e.g., regarding seniority, what services are to be provided by whom
- b) determine scheduling requirements, considering, for example:
 - specific tasks
 - specific skills required, e.g., bilingual employee
 - projected business volumes
 - hours of operation
 - employment legislation
 - union agreements
 - employees' capabilities and special needs
 - budget restrictions, e.g., labour costs
 - size and limitations of facility
 - vacation time booked
 - leaves of absence

- employees' requests/availability
- previous staffing levels
- c) draft schedule
- d) review schedule to ensure that all shifts, positions, and requirements are covered:
 - ensure that schedule meets budget guidelines
- e) finalize schedule:
 - seek approval from manager, if required
- f) communicate schedule to employees in timely manner, e.g., post schedule one week in advance of its taking effect
- g) revise schedule as required
- h) notify individuals of changes made after posting, e.g., circle changes on posted schedule, telephone employee

Notes:

- be prepared for short-notice replacements, e.g., sick leave
- sometimes better (e.g., high volume) shifts are given to employees based on seniority or who is current top performer

Frequency:

- performed once per week
- often revised daily
- may be completed well in advance of holiday periods

Variations:

- organizations with flexible work options, such as job sharing, may require specific documentation related to scheduling
- unionized environments may require scheduling of specific number of hours/shifts for unionized employees

Conditions (limiting factors):

- budget limitations, insufficient number of staff, changes in volume of business, and changes in management focus can make skill difficult to perform

Supervisory Skills



1.3 conduct on-the-job supervision

Why is this skill important?

- to direct individual and team performance
- to assist employees when they need help
- to help ensure consistent quality of products and services
- to identify training needs
- to help ensure safe environment
- to help ensure positive experience for employees and customers
- to develop trust and relationships
- to promote sharing of ideas, which can contribute to increased productivity
- to lead by example

a) review:

- work schedule
- tasks to be accomplished
- workplace checklists, e.g., are they being used as intended, are they current
- employees' performance
- individual needs for supervision and training
- safe practices

b) establish working relationship with employees, e.g., promote open-door policy

c) communicate instructions and performance requirements for tasks:

- confirm understanding, e.g., ask employees to paraphrase
- communicate special instructions and situations as required, e.g., hold staff briefing for large event

d) monitor performance of tasks:

- ensure that employees maintain professional appearance and demonstrate professionalism
- ensure adherence to production and service standards

e) coach, for example:

- use informal approach, e.g., conversational tone
- observe employee before giving feedback

- give feedback in positive manner:
 - focus on correct way to perform task
 - deal with one skill at a time to avoid overwhelming employee
- demonstrate correct procedures
- adapt feedback to specific needs:
 - build on current knowledge and skills

Notes:

- supervisor may enlist help of senior staff to train, mentor, or supervise junior staff

Frequency:

- constant

Variations:

- method of communicating information may be dictated by organizational policy

Conditions (limiting factors):

- supervisors who provide front line service and perform various other tasks in addition to supervisory duties may have limited time



1.4 resolve conflicts between employees

Why is this skill important?

- to support productive, positive work environment
- to support good, productive working relationships

a) determine nature and extent of problem or issue:

- investigate facts, for example:
 - talk to employees and witnesses involved
 - talk to management
 - refer to personnel files for background information

b) determine best time to address problem or issue

- c) facilitate conflict resolution:
 - help parties to negotiate issues
 - determine best course of action
- d) seek agreement on solution from all parties, if possible:
 - refer to management, if required
- e) follow up, for example:
 - ensure that conflict is resolved
 - document issue
 - notify other members of management team

Notes:

- how skill is handled will depend upon extent and seriousness of conflict
- not all conflicts will be solvable:
 - there are sometimes factors over which supervisor has no influence
- supervisor should make every effort to resolve conflict as quickly as possible
- wherever possible, staff should be encouraged to work through conflicts themselves before supervisor gets involved

Frequency:

- as needed

Variations:

- in some operations, certain issues may be handled by management
- in unionized environment, process for dealing with situation may be laid out in union agreement

- a) determine if a meeting is necessary
- b) determine type of meeting required, e.g., information-sharing, decision-making
- c) determine who should attend meeting
- d) prepare for meeting:
 - confirm availability of key participants
 - solicit agenda items from participants
 - prepare outline or agenda, listing issues to be discussed
 - make meeting room arrangements, e.g., book meeting space
 - determine resources or materials required
- e) inform employees of meeting location, starting time, and duration, for example:
 - post notice of meeting, whether it is mandatory, and whether staff will be paid for time
 - schedule employees to attend, i.e., put meeting on schedule
 - distribute agenda prior to meeting
- f) conduct meeting:
 - set parameters at beginning of meeting
 - facilitate meeting, for example:
 - stay on topic
 - allow input from all participants
 - limit time for discussion
- g) record minutes:
 - follow up as required, e.g., date of next meeting, policy revisions
- h) adjourn meeting at scheduled time
- i) distribute or post meeting minutes
- j) ensure that follow up is completed

Notes:

- staff meeting may be more informal than described:
 - quick daily briefing meetings will not have agendas circulated before they take place
- it is important to keep information presented or discussed to manageable amount within time frame

Frequency:

- formal staff meetings, as described, may be scheduled weekly or monthly



1.5 conduct staff meetings

Why is this skill important?

- to allow sharing of information and ideas
- to address specific areas, e.g., health and safety, service
- to keep staff up to date
- to identify problems and share successes
- to support positive morale

Supervisory Skills

- briefing or shift meetings happen daily
- some meetings are scheduled as need arises

Variations:

- in organizations where staff work outside of office, other forms of communication may be required

Conditions (limiting factors):

- unexpected events that affect operation, lack of meeting facilities, or unavailability of staff can make it difficult to perform skill
- budget constraints may prevent all staff from attending regular meetings

- d) match product to customer, if applicable, e.g., arrange dinner for twenty at restaurant that has capacity for group
- e) be aware of customers' reactions to products and services, e.g., body language, comments
- f) be up to date about new products, services, and suppliers

Notes:

- primary function of every employee is to promote sales of products and services

Frequency:

- constant

Variations:

- for some organizations (e.g., tour operators, destination management), it is crucial to stay up to date on products available to customers

■ SKILL 2. SUPERVISE PRODUCTS AND SERVICES



2.1 be knowledgeable about products and services

Why is this skill important?

- to allow selling of correct product to customer
- to allow employees to recommend products and services with confidence
- to inspire confidence in customers
- to allow safe use of products

- a) be able to identify available products and services
- b) be able to describe products and services, for example:
 - history
 - content
 - logistics
 - restrictions
 - selling price
 - availability
 - strengths and weaknesses
- c) know where to locate information about products and services, e.g., suppliers' and organizations' reference materials



2.2 determine ways to improve products and services

Why is this skill important?

- to support and improve revenue levels
- to support and improve customer service
- to keep up with industry changes
- to improve organization's image
- to improve productivity

- a) identify areas that need to be improved through:
 - own observations
 - suggestions from employees
 - customer feedback, e.g., customer comment cards
- b) review current situation, for example, consider:
 - labour and product costs
 - policies and procedures
- c) consider ways to improve products and services

- d) consider impact of improvements, for example:
 - cost of initiative
 - scheduling
 - quality of product
 - level of service
- e) forward recommendations to management
- f) make changes to improve products and services as directed

Notes:

- it is important to thank employees and customers for their suggestions and feedback
- reward staff whose ideas are implemented:
 - this will encourage creativity and future ideas

Frequency:

- constant

Conditions (limiting factors):

- management support and organizational policy may affect supervisor's ability to suggest changes to products or services offered

- d) correct discrepancies between standards and delivery of products and services, e.g., through retraining or coaching
- e) follow up to ensure that discrepancies are corrected
- f) seek customer feedback about organizational standards, e.g., ask customers about level of satisfaction

Frequency:

- constant

Variations:

- some organizations have tools that help to maintain quality control, e.g., plating photographs in kitchen of restaurant, procedure manual
- discrepancies may be monitored by someone other than supervisor, e.g., silent shopper

Conditions (limiting factors):

- lack of specific standards for products and services can make it difficult or impossible to perform skill

■ SKILL 3. INTERACT WITH CUSTOMERS



2.3 provide quality control for products and services

Why is this skill important?

- to support revenue levels
- to support consistency of product and service delivery
- to support professional and positive image

- a) know organization's standards for products and services
- b) communicate standards to employees, e.g., through training, reminders, or meetings
- c) monitor production and delivery of products and services



3.1 provide customer service

Why is this skill important?

- to encourage success of organization through repeat business
- to promote professional image of self, employees, and organization
- to build word-of-mouth advertising
- to be role model for staff

Supervisory Skills

- a) make customer feel welcome, for example:
- acknowledge customer, e.g., smile and make eye contact, introduce self
 - be sensitive to cultural differences and preferences
 - pay attention to all members of customer group
- b) determine and anticipate customer's needs:
- ask questions to clarify needs
 - listen actively
- c) provide quality products or services to meet needs:
- provide information
 - if unable to supply product or service immediately:
 - advise of earliest date available
 - refer customer to alternate source
 - exceed customer's expectations, when possible, e.g., provide additional service
- d) give on-site customer priority over customer on telephone:
- if speaking on telephone when customer enters:
 - acknowledge on-site customer
 - deal with call courteously and promptly or offer to call back
- e) thank customer, e.g., for interest in organization, for purchase:
- address customer by name, if possible
 - invite customer to return
 - solicit feedback about product or service

Notes:

- it is important to show interest in customer, e.g., ask where he/she is from
- post service tips in workplace, e.g., reminder to thank customers on customer check notepad, smile sticker on telephone
- keep customers informed, e.g., when busy, tell new customers that you will be right with them

Frequency:

- constant

Variations:

- whether customer is on his/her own or part of group will impact how skill is performed, e.g., more time for one-on-one discussion and more tailored approach with one or two customers
- some organizations suggest specific customer service actions, e.g., specific way to approach customer and introduce self

Conditions (limiting factors):

- supervisor may not always be working on front line



3.2 provide service to customers with special needs

Why is this skill important?

- to encourage success of organization through repeat business
- to be role model for staff
- to tailor service to customer's individual needs
- to treat every customer in professional manner

- a) develop policies or recommendations for policies regarding service to customers with special needs
- b) determine special need that may require extra customer service, for example:
- people with small children
 - people with disabilities, e.g., physical, visual, or developmentally challenged
 - senior citizens
 - people that do not speak local language
 - people with cultural/religious requirements
 - people with allergies and special dietary requirements
- c) identify resources available to assist special-needs customers, for example:
- colouring books for children
 - ramps for wheelchairs

- Braille menus for visually-impaired customers
 - specially-equipped washrooms
- d) offer same respect and level of service for special-needs customers as for other customers
- e) anticipate needs of customers with special needs, e.g., remove chair to accommodate wheelchair prior to arrival
- f) communicate with customer, for example:
- ask if assistance is required
 - speak appropriately, for example:
 - face hard-of-hearing customers and use normal tone and volume:
 - >use appropriate gestures
 - explain activities as necessary to visually-impaired customers
 - adjust language and rate of speech for foreign-language speaking customers
- g) seek assistance, if required, e.g., ask for assistance from other staff members who speak foreign language or have special training

Notes:

- some special-needs customers will require more time and attention than others
- in some provinces/territories skill will be covered by legislation
- consider providing sensitivity training to staff for providing service to customers with special needs

Frequency:

- as needed, often daily

Conditions (limiting factors):

- physical environment, limited amount of time, and needs of other customers can make skill difficult to perform



3.3 handle customer concerns or complaints

Why is this skill important?

- to improve customer satisfaction
- to allow customer to leave feeling that concern has been addressed
- to allow customer needs to be met as quickly as possible
- to reduce stress levels for self, employees, and customer
- to reduce chance of difficult situation escalating
- to help identify areas needing change or improvement

a) listen to details of concern or complaint:

- take customer aside, if possible
- remove source of concern, if possible, e.g., remove plate of food
- do not interrupt
- paraphrase to ensure understanding
- ask open questions for clarification

b) empathize with customer:

- apologize for inconvenience
- thank customer for voicing concern or complaint

c) remain impartial:

- do not argue with customer
- do not make excuses
- take concern or complaint seriously, but not personally

d) investigate facts, if necessary:

- ask for all points of view
- clarify responsibilities, e.g., identify warranty's expiry date

e) ask for customer's input on possible solutions

f) select and follow through on best solution:

- notify customer of action to be taken

g) follow up:

- ensure that concern or complaint has been resolved

Supervisory Skills

- record concern or complaint and action taken
- take action to prevent similar occurrences in future, e.g., address issue at staff meeting, inform staff and management of concern/complaint and how it was handled

Notes:

- depending upon severity of complaint, process for resolution could be very simple, e.g., resolved with apology from supervisor
- customer's perception is most important factor when dealing with concern or complaint
- important to know difference between concerned/complaining customer and abusive customer
- emotion must be handled before complaint can be addressed

Frequency:

- as needed

Variations:

- supervisors may have different levels of authority to resolve concerns and complaints
- concerns and complaints may be received by another department (e.g., customer service) and then communicated to supervisor

Conditions (limiting factors):

- level of responsibility and customer's personality can make skill difficult to perform
- customer may refuse to deal with supervisor and demand to speak to manager, in which case supervisor is not able to resolve issue



3.4 handle abusive customers

Why is this skill important?

- to support professional image of organization
- to demonstrate proper skills to staff
- to diffuse difficult situations
- to protect self and others
- to limit damage and inconvenience to other customers

- a) notify management and/or security
- b) be calm and courteous
- c) ask customer to refrain from undesirable behaviour, e.g., swearing, disturbing other customers
- d) if undesirable behaviour continues:
 - ask customer to leave and not return
 - try to move abusive customer away from other customers, if possible
- e) discreetly apologize to inconvenienced customers
- f) call police or appropriate authorities, if applicable
- g) follow up to ensure that undesirable behaviour ceases
- h) document incident and steps taken, e.g., name, date
- i) discuss incident with management

Notes:

- supervisors should take care with language they use in difficult situations, as it will have impact on all customers

Frequency:

- as needed

Variations:

- management or security may not need to be notified unless situation cannot be solved by supervisor

Conditions (limiting factors):

- customer's alcohol, drug use, and level of agitation can make skill difficult to perform



3.5 respond to positive comments or gifts from customers

Why is this skill important?

- to allow customer to feel valued
- to share positive feedback with others
- to improve staff morale

- a) thank customer
- b) notify appropriate parties of positive comments, e.g., others on shift, department staff, director
- c) share gifts, for example:
 - distribute among staff whenever possible
 - post letters or cards in key areas, e.g., near schedule
 - donate gifts to charity

Notes:

- be aware of organizational policies regarding gifts from customers:
 - some organizations cannot accept gifts for political reasons:
 - >explain policy to customer and politely decline gift

Frequency:

- as needed

SKILL 4. SUPERVISE FACILITY OPERATIONS



4.1 create checklists for operations

Why is this skill important?

- to encourage tasks to be performed routinely
- to allow consistency in products and service
- to encourage all staff to know responsibilities and duties

- to increase safety and security
- to support systems, regardless of which staff members are on duty
- to encourage proper documentation to be kept

- a) identify areas where checklists are required, for example:
 - opening
 - closing
 - cashing out
 - reservations
- b) seek input from individuals who are responsible for tasks
- c) for each area:
 - itemize activities that must be completed:
 - in logical order, e.g., according to time sequence
 - in simple terms
 - provide examples
- d) ask management and those who perform tasks to review checklists
- e) finalize checklists
- f) communicate information about checklists to employees, for example:
 - purpose
 - priority
 - location
 - when to use
 - completion procedures
- g) ensure completion of tasks as required
- h) review checklists regularly

Notes:

- organization may already have specific checklists, in which case checklists will not need to be created, only followed
- using checklists will subtly boost morale for those that find checking/crossing off completed tasks rewarding

Frequency:

- checklists are created on as needed basis, but completed daily

Supervisory Skills



4.2 handle cash

Why is this skill important?

- to allow sales for day to be collected and recorded accurately
- to manage risks

- a) communicate policies and procedures for safe cash handling, for example:
 - persons designated to handle float or make deposits
 - robbery prevention
 - handling foreign currency
- b) verify accuracy of cash sheets
- c) maintain workable float:
 - ensure variety of bill denominations and coins
 - ensure that float is adequate
- d) conduct random float audits:
 - ensure that float balances
 - record shortages or overages
- e) adhere to security procedures, for example:
 - set maximum amount of cash to be held in cash register
 - deposit excess cash at random intervals in bank or drop safe

Notes:

- ask local police if robbery prevention training is offered:
 - most major city police forces offer this free of charge

Frequency:

- daily

Variations:

- some operations may not handle cash, but may handle other items, such as tickets, that represent revenue for organization
- in some organizations, each employee will be responsible for own cash summary
- in some organizations, supervisor will be responsible for dropping cash/receipts in safe

- some organizations may ask supervisors to complete additional steps depending on organizational policy



4.3 promote workplace safety

Why is this skill important?

- to support safe environment for employees and customers
- to help manage risks

- a) maintain personal safety:
 - know procedures for dealing with threats to personal safety, e.g., know locations of panic buttons
 - avoid situations that may be misinterpreted, e.g., avoid being alone with customer in non-public place
 - do not prolong discussions that have opportunity to turn hostile, e.g., highly emotional or political issues
 - establish personal space, if possible
 - assess level of risk situation poses:
 - take action if situation poses significant risk to physical or emotional safety:
 - >ask for assistance, e.g., contact manager
 - >remove self from situation
- b) follow provincial/territorial and/or federal legislation, e.g., Occupational Health and Safety Act, for example:
 - post guidelines for safe handling and storage of hazardous materials, e.g., flammable materials, dangerous goods:
 - refer to Workplace Hazardous Materials Information System (WHMIS) and/or Workers' Compensation Board (WCB)
- c) determine safety training required, e.g., consult with management, workplace safety committee, or suppliers
- d) provide hands-on training for all equipment and operational procedures:
 - have equipment manuals and operational procedures available to employees

- e) be familiar with layout of facility, for example, locations of:
 - shut-off mechanisms
 - emergency exits
 - emergency equipment and first aid kits
- f) identify work site hazards immediately, e.g., sharp corners, slippery floors:
 - eliminate potential hazards, e.g., sweep up broken glass, mop up spills
- g) identify on-duty first aid attendant and how he/she can be contacted, if applicable
- h) reinforce safety:
 - post safety signs, posters, emergency telephone numbers, and reminders
 - offer training
 - ensure that customers are aware of safety requirements
 - perform regular safety audits

Notes:

- ensure that staff are qualified to operate equipment, e.g., certified, licenced

Frequency:

- constant

Variations:

- some organizations have internal health and safety committees that meet to identify and discuss organizational safety issues and will also inspect organization
- in some organizations, skill will be management responsibility
- extra precautions are required in historic buildings, e.g., stairs may be narrower and steeper than in modern buildings

- a) inform staff of relevant costs, e.g., equipment, maintenance
- b) identify information sources for repair and maintenance, for example:
 - operating manuals
 - reference books
 - building and safety codes
 - lists of contractors and tradespeople
 - maintenance departments and procedures
- c) ensure that staff are operating equipment properly, e.g., are following standard operating procedures
- d) determine maintenance and repairs required, for example:
 - preventative maintenance
 - daily operating and safety checks
 - repairs of nonfunctioning equipment
- e) determine who is authorized to perform required maintenance and repairs, considering qualifications, time frame, and costs, for example:
 - self
 - employee
 - contractor, e.g., licenced electrician, janitor
- f) notify management of maintenance and repairs that are required, if necessary
- g) schedule maintenance as required
- h) document repairs and maintenance performed, including date and description of work completed
- i) inform management and staff that maintenance has been completed
- j) follow up as required, e.g., comply with warranties, monitor operation of equipment

Notes:

- if maintenance person is called, supervisor should discuss work to be completed with him/her before work begins
- ensure that work is performed to satisfactory level:
 - if unable to complete work in one session, confirm return date according to requirements
- ensure that staff are aware that they should inform supervisor/manager immediately if equipment is malfunctioning



4.4 maintain facility and equipment

Why is this skill important?

- to allow safety of staff and customers
- to avoid injury
- to control costs
- to help meet legislative requirements

Supervisory Skills

Frequency:

- as needed

Variations:

- in some organizations, skill may be responsibility of maintenance department or management
- some facilities and equipment may be rented or leased, so will be maintained and repaired by companies that own them



4.5 prepare for emergencies

Why is this skill important?

- to support customer and employee safety
- to reduce insurance premiums
- to prepare self for unexpected events
- to reduce panic and additional injuries or losses
- to reduce chances of error during emergency

a) identify possible emergency situations, for example:

- medical
- fire
- hazardous-waste spills
- accidents
- natural disasters
- robbery
- vandalism
- terrorism, e.g., bomb threat

b) familiarize employees with emergency plans:

- identify who will take charge
- provide training
- identify location of incident report forms and how to complete them:
 - explain importance of reporting details, e.g., date, time, action taken
- post emergency procedures, telephone numbers, and names of staff with emergency training
- conduct regular safety drills

- identify organization's spokesperson for enquiries

c) ensure that first aid kits and safety equipment are:

- accessible
- fully stocked:
 - check contents regularly:
 - > replace stale-dated products
- suitable for facility requirements

d) conduct routine safety audits, for example:

- ensure:
 - that employees know location of emergency equipment, e.g., first aid kits, fire extinguishers, fire alarms
 - that employees know names of staff members with relevant skills, e.g., other languages, first aid, cardiopulmonary resuscitation (CPR)
 - that emergency equipment is operational, e.g., fire extinguishers are charged, emergency lighting is working
 - accessibility for emergency vehicles
 - that emergency access routes are clearly marked and unobstructed

Frequency:

- daily
- monthly for equipment/supply checks



4.6 respond to emergencies

Why is this skill important?

- to limit damage to self, customers, staff, and organization
- to assist in safety of customers and staff
- to help avoid liability

a) remain calm

b) assess situation, e.g., remove hazards, if possible and safe to do so

c) call emergency authority and report situation:

- follow instructions of emergency authority, for example:

- provide requested information, e.g., details about address or location
 - evacuate building
 - secure area
 - ensure that people with injuries are attended
- d) meet emergency personnel, if possible:
- assist as directed
- e) record details of emergency:
- date and time of report
 - nature of emergency
 - time authorities were contacted
 - time authorities arrived
 - action taken
 - names and telephone numbers of witnesses
- f) follow up, for example:
- inform appropriate agencies, e.g., insurance company
 - fill out forms or reports, e.g., WCB
 - take action to prevent reoccurrence
 - evaluate response to emergency and make recommendations for improvement

Notes:

- when in doubt, call emergency response team

Frequency:

- as needed

F. Sales and Marketing Skills

■ SKILL 1. PROMOTE SALES



1.1 assist in collecting marketing information

Why is this skill important?

- to determine customer needs and wants
- to better direct/assist marketing initiatives to improve sales
- to better understand direction of organization
- to be aware of changing trends

a) identify desired information, for example:

- customer demographics, e.g., family size
- opinions about product or service
- how customer heard about organization
- competitors

b) collect relevant information, for example:

- distribute customer surveys
- encourage employees to report customers' comments
- encourage employees' feedback
- review sales reports
- review silent shopper reports

c) communicate market trends to employees and management:

- forward information to marketing department or manager
- make recommendations, if applicable

Notes:

- to be useful, information must be kept up to date and pertinent

Frequency:

- as needed, e.g., as directed, according to policy

Supervisory Skills

Variations:

- in some organizations, there are particular types of information that supervisors and employees will be required to collect on daily basis, e.g., accommodations industry uses market source codes
- research is sometimes done by marketing department or outside consultant
- management style of organization may dictate how much supervisor will be included in these activities
- in small organizations, supervisors will have more exposure to first-hand information from customers, while in larger organizations, information may be filtered through other persons or other methods, e.g., database, filing system

Conditions (limiting factors):

- poor communication or lack of communication between levels of management within organization can make this skill difficult to perform
- lack of usable system for filing or classifying information can make skill difficult to perform



1.2 conduct sales and marketing promotions

Why is this skill important?

- to increase revenue
- to stimulate interest, trial, or purchase by customer
- to learn about what kinds of promotions work for organization

- a) follow provincial/territorial legal/licensing requirements for promotions
- b) be aware of image of organization
- c) assist in establishing promotional goals and target market consistent with organization's image
- d) obtain feedback from employees, e.g., through brainstorming

- e) review promotions for loopholes, misunderstandings, and opportunities for abuse
- f) implement sale or promotion:
 - co-ordinate with other departments, if necessary
 - communicate details and goals to employees
- g) monitor sale or promotion:
 - ensure that critical path is being met
 - recommend adjustments as needed
- h) record sale/promotion details and results for future reference:
 - file any documents/materials used, e.g., contest entries, pamphlets
 - document personal experiences and suggestions

Notes:

- it is important for supervisor to understand concept of return-on-investment (ROI), i.e., what benefit will organization see for investment of money or resources
- promotions that competition is engaged in can affect how and when own organization will run promotion
- partnering with other organizations can save costs and allow own organization to reach markets that might otherwise be unavailable, e.g., specialized tradeshows

Frequency:

- as needed, sometimes as directed by sales manager/department

Variations:

- depending upon organization, supervisor may have input into decisions about advertising for promotions

Conditions (limiting factors):

- size of promotional budget and human resources available can limit how skill is performed



1.3 conduct employee sales incentive contests

Why is this skill important?

- to increase awareness of target item or service
 - to increase sales and productivity
 - to raise employee morale, e.g., by initiating friendly competition
 - to lead to potential financial gains for employees
 - to encourage employees to take ownership of work
 - to build co-operation between employees and departments
- a) ensure that contests involve all employees in department or division
 - b) establish goals that are attainable, e.g., short- and long-term
 - c) establish and document details of contest, for example:
 - procedures
 - time frame
 - rules, e.g., ensure that contest is fair to all employees, establish minimum sales quantities
 - prizes:
 - employees must perceive value in reward
 - d) co-ordinate contest with other departments, if necessary
 - e) communicate details to employees and management
 - f) encourage participation
 - g) evaluate contest by comparing results to goals
 - h) recognize contest winners publicly, e.g., post in employee newsletter
 - i) record contest details and results for future reference

Notes:

- creating fun but competitive environment can help to create successful sales incentive contests
- goal or target must be attainable and reward relative to difficulty of achieving goal
- rewards for sales incentive contests do not need to cost money, e.g., allow employee extra 15-minute break while supervisor covers duties, recognize employee in monthly memo, give products offered by suppliers
- incentives and contests should be conducted with sensitivity to customers

Frequency:

- as needed, e.g., to boost morale, to boost business levels

Variations:

- size and budget of organization can affect how contests are carried out
- different organizations will have different levels of empowerment for supervisors to conduct contests, e.g., one organization may encourage supervisor to develop contests when they see fit, while another may dictate what contests will be run and when
- if supervisor is participating in contest, he/she would not be able to track results or award prizes

Conditions (limiting factors):

- lack of communication (e.g., lack of knowledge about contest), lack of management support, and lack of employee interest in contest or reward can make skill difficult to perform
- employee incentive contests may not be permitted by organization

■ SKILL 2. ASSESS COMPETITION



2.1 assess competition

Why is this skill important?

- to gain insight into areas where organization can improve
- to better understand organization's position in current marketplace
- to increase knowledge of industry trends
- to support or increase organization's market share

- identify competition
- respect competition as potential source of ideas or partners for joint ventures:
 - be open-minded, tactful, and supportive
- conduct on-site evaluations to ask about/observe, for example:
 - customer counts, characteristics, and satisfaction levels
 - service and production procedures
 - decor
 - marketing practices
 - staff attitudes and morale
- assist with SWOT analysis, i.e., identifying **strengths**, **weaknesses**, **opportunities**, and **threats**
- report findings to management
- use media to observe competitors':
 - activities
 - marketing techniques
 - critical reviews
- obtain feedback from own customers and employees about competitors:
 - use discretion when asking for or responding to feedback
- suggest ways to implement new ideas and practices to improve operation

Notes:

- in accommodations industry, having knowledge of competition can benefit own property and others:

- when oversold, organization may need to move customers to competing business
- when competitors are doing well, it may not be threat to organization:
 - whole industry could be doing very well

Frequency:

- ongoing

Variations:

- number and type of competitors in organization's area will dictate how often and to what depth skill is performed, e.g., in remote areas there may be no other competing businesses

■ SKILL 3. CONDUCT COMMUNITY-RELATIONS ACTIVITIES



3.1 define community

- network made up of, for example:
 - service and special interest groups
 - general public, including people living in area
 - tourism industries
 - institutions
- own organization is part of community and has responsibility to it



3.2 participate in community activities

Why is this skill important?

- to increase public awareness of organization and industry
- to improve organization/industry image and goodwill
- to generate new business and encourage repeat business, e.g., increases bottom line

- to promote pride in self and one's work
- to assist community that supports organization

- lead by example
- network, and encourage employees to do same, e.g., at community events
- be aware of and promote local events and attractions
- help develop plan to provide service to community, e.g., sponsor events or teams
- donate personal time to community causes
- evaluate impact of community activities, e.g., changes in business volume

Notes:

- public relations activities are usually management-initiated and management-driven

Frequency:

- as needed

Variations:

- scale of community involvement can vary with size of organization, e.g., large impact can be made in rural or isolated area by small involvement or activity, while in urban centre, organization may have to do more to achieve same impact

Conditions (limiting factors):

- lack of resources (e.g., time, money) can limit individual's ability to perform skill
- access to media can affect success of skill, e.g., how many people attend community event run by organization

G. Administrative Skills

■ SKILL 1. PERFORM ADMINISTRATIVE DUTIES



1.1 operate office equipment

Why is this skill important?

- to be able to complete daily duties
- to assist customers and staff
- to improve communication

- describe office equipment and systems used in place of work, for example:
 - computer system, e.g., printers, network, software
 - communication systems, e.g., two-way radio, e-mail, telephone, facsimile machine
 - photocopier
 - credit card imprinter
 - credit/debit card authorization system
 - point-of-sales system
 - calculator
- determine operating guidelines, for example:
 - read manufacturer's operating instructions
 - ask for assistance from co-workers
 - take courses to upgrade skills, e.g., learn new software programs
 - establish service and repair procedures and/or contact person
- practice new skills, e.g., use software on own after taking training
- follow operating and maintenance guidelines

Notes:

- ask for help if unsure about how to operate equipment

Frequency:

Supervisory Skills

- daily

Variations:

- organization may ask one person to learn operating guidelines and instruct other staff
- maintenance may be completed by another department or individual

Conditions (limiting factors):

- lack of supplies, poorly maintained equipment, and manufacturers' instructions that are no longer available can make skill difficult to perform



1.2 maintain records

Why is this skill important?

- to allow critical information to be available when needed
- to assist in setting future goals, i.e., business planning
- to save time, energy, effort, and money
- to allow confidential information to be stored securely
- to support adherence to legislation and other requirements

a) identify types of records required, for example:

- payroll
- personnel
- budget
- maintenance
- security
- inventory
- sales
- revenues and expenses
- customer statistics
- staff schedules
- electronic/computer files

b) complete records as required, e.g., daily,

monthly, annually

- c) ensure that information recorded is accurate and complete, e.g., date, calculations, counts
- d) circulate copy, if required, e.g., to management, to other departments
- e) file hard copy and back up electronic copies or data:
 - keep records current, e.g., store or delete old information

Notes:

- use of standard forms can help to keep records accurate and up to date
- in some organizations, records must be confidential, and may be kept in locked drawers or boxes to which supervisor will have access
- ensure that records are properly indexed for easy retrieval
- review files annually to see what needs to be kept at hand and what can be archived

Frequency:

- daily
- some records are completed weekly or annually

Variations:

- form that records take (e.g., in binders, notepads) may vary depending upon worksite, e.g., outdoors, small work shack
- computer systems may affect way records are completed
- larger organizations may have other departments, such as human resources or accounting, to keep and maintain records

Conditions (limiting factors):

- working environment can limit individual's ability to perform skill, e.g., outdoors, lack of office space



1.3 describe key elements of organization

- a) mission statement, goals, business plan, and mandate
- b) organizational structure, for example:
 - managers of each department
 - level of authority
 - areas of responsibility
 - reporting structure
- c) functions of departments
- d) interrelationships between departments
- e) own job description and how it fits in with organizational structure



1.4 implement policies and procedures

Why is this skill important?

- to support consistency of service and smooth operation of organization
 - to create change and make improvements
- a) review policies and procedures:
 - gain insight into purpose and method of implementation
 - seek assistance, if required, e.g., ask manager
 - b) be familiar with process for making changes to policies and procedures, for example:
 - identify new issues or areas, e.g., review customer complaints to identify issues
 - make recommendations for development or revisions
 - obtain approvals
 - c) notify employees of changes and reasons for change
 - d) ensure that employees adhere to policies and procedures
 - e) evaluate effectiveness of changes to policies and procedures:
 - monitor impact on business

- f) keep policy and procedure manuals up to date

Frequency:

- constant

Conditions (limiting factors):

- lack of organizational policies and procedures, and lack of manuals, can make skill difficult or impossible to perform



1.5 participate in business planning activities

Why is this skill important?

- to contribute own skills and talents toward improving organization
- to generate new ideas and solutions to problems
- to develop commitment to organization

- a) attend planning sessions with peers and management:
 - provide input
 - participate in discussions
- b) review/analyze current productivity
- c) identify opportunities to improve efficiency, e.g., ask for input from team members
- d) discuss recommendations with management
- e) follow up on recommendations

Notes:

- good idea to have beginning-of-season/once-a-year meeting with all supervisors to discuss annual business planning
- ensure that ideas can be integrated into operation:
 - consider impact of ideas on all aspects of business

Supervisory Skills

Frequency:

- as needed, depending upon management and organization
- could be as often as weekly, or as rare as annually

Variations:

- in larger operations, supervisor may have less contact with management and smaller role in organizational planning

Conditions (limiting factors):

- if supervisor is not asked to contribute to planning, or comments are not welcomed, it can be difficult to perform skill
- insufficient or inadequate information can make skill difficult to perform

- supervisor will go through all stages either way

Frequency:

- as needed, e.g., at beginning of season
- action plans are reviewed regularly

Variations:

- level of responsibility will vary from organization to organization
- many organizations will provide objectives to supervisor, and supervisor will be responsible for carrying out tasks to meet objectives

Conditions (limiting factors):

- lack of resources and of realistic objectives can make skill difficult to perform



1.6 develop action plans

Why is this skill important?

- to be able to estimate resources (e.g., labour, time, money) required by organization
- to help reach long- and short-term goals

a) list objectives to be completed:

- itemize objectives in measurable terms

b) rank objectives in logical order

c) determine tasks required to achieve each objective

d) determine resources needed:

- timelines, e.g., dates for regular reviews
- budget
- personnel
- tools and equipment

e) seek input from employees on plan

f) seek approval from management, if required

g) make adjustments as required

Notes:

- developing action plan can be formal or informal process:



1.7 implement action plans

Why is this skill important?

- to encourage objectives to be met
- to make changes to organization
- to allow staff to understand their roles and responsibilities

a) communicate plan to those involved

b) assign tasks

c) monitor tasks

d) review/adjust plan as required

e) measure results

f) evaluate outcomes

g) make recommendations for improvement

Frequency:

- as needed

Variations:

- complexity of skill will be dependent upon worksite, e.g., for supervisor of admissions cashier, it may only require simple checklist

Conditions (limiting factors):

- lack of resources (e.g., money, time, staff) and other operational issues that compete for time (e.g., unexpected events, emergencies) can make skill difficult to perform
- communication with staff who work remotely may be difficult

- justify activities with knowledge of legislation
- d) ensure compliance with legislation
- e) be up to date on changes to legislation:
 - ensure that management and staff are aware of changes to legislation

Notes:

- participation with industry associations is good way to stay informed about new legislation that affects business

Frequency:

- constant

Variations:

- location may determine applicable legislation
- unionized environments may have additional requirements

■ SKILL 2. COMPLY WITH LEGISLATION AND CONTRACTS



2.1 comply with legislation

Why is this skill important?

- to allow obligations to be met
- to promote positive image of organization
- to maintain safe and pleasant workplace
- to help avoid liability

- a) identify areas where legislation is applicable, for example:
 - public health
 - accommodation
 - taxes
 - fire codes
 - environment
 - employment standards
 - human rights
 - occupational health and safety
 - licensing
 - liquor laws
 - privacy acts
 - safety codes for vehicles
- b) obtain information about legislation, e.g., call authorities, contact government office
- c) apply legislation to organization and activities:
 - train/inform employees about legal obligations



2.2 comply with contracts

Why is this skill important?

- to allow obligations to customers, suppliers, and employees to be met
- to promote positive image of organization and industry
- to support consistency
- to help avoid liability

- a) identify types of contracts, for example:
 - union contracts
 - supply agreements
 - employment contracts
 - customer contracts
- b) understand requirements of contracts:
 - ask for clarification, if necessary
- c) inform employees of requirements and conditions of contracts
- d) adhere to requirements and conditions of contracts

Notes:

- contracts can specify how one interacts with other businesses, e.g., what product and at what price:
 - implications of not following specifications can be significant

Frequency:

- as needed, e.g., when new contract is signed

Variations:

- supervisor may only need to know specific parts of contracts to do job
- supervisors in some organizations will not deal with contracts at all, as this will be done at management level

Conditions (limiting factors):

- lack of access to sufficient information and/or person to answer questions about contracts can limit individual's ability to perform skill

H. Financial Skills

■ SKILL 1. MONITOR BUDGET



1.1 participate in budget development

Why is this skill important?

- to have clear vision of organizational structure and goals
- to understand reasons behind organizational decisions
- to promote commitment to business budget development

a) understand:

- department's roles and responsibilities in overall budget
- that organization's budget information is confidential
- organization's short- and long-range goals

b) review current level of business and extent to which goals are being met, e.g., note lineups, calls waiting, and/or complaints

c) review budget control guidelines

d) review previous budgets and financial reports:

- compare actual to previous projections

e) assist in setting goals for budget

f) determine resources needed to achieve projected revenues and expenses, e.g., materials, services, sales

g) advise management of estimated costs, e.g., payroll, product, maintenance, capital expenditures

Notes:

- open communication about budget can promote better co-operation in workplace
- supervisors can have great impact on labour costs

Frequency:

- budgeting is done annually or as rolling process, i.e., money left over in one year is moved forward into next year's budget
- review of actual revenue to projections is ongoing

Variations:

- some organizations may supply information and parameters for budget decisions

Conditions (limiting factors):

- some organizations will have closed-book policy that will make skill impossible to perform because of lack of information

c) identify variances between budgeted and actual figures:

- report variances in revenues and expenses to management as required:
 - identify causes and appropriate responses, for example:
 - > revise budget and activities as required
 - > reallocate funds to cover unexpected expenditures and/or revenue

Notes:

- budget is long-term financial plan:
 - it is not same as cash flow or profits and losses

Frequency:

- as needed, daily, or monthly, depending upon type of business

Variations:

- in larger organizations, skill may be compartmentalized and tasks divided among several departments:
 - in this case, supervisor may have less input
- whether organization is public or private will affect how budget skills are performed:
 - in public business, all information is accessible
 - in private organization, access to information may be limited
- in smaller operations, supervisor may need to be more aware of cash flow than of budget

Conditions (limiting factors):

- lack of access to information can make skill difficult to perform



1.2 monitor and control budget

Why is this skill important?

- to allow budget goals to be met
- to identify market differences and internal differences that affect budget targets
- to make ongoing adjustments based on current realities

a) adhere to budget control guidelines, for example:

- monitor product costs
- ensure that productivity levels are maintained
- increase or reduce number of employees
- increase or reduce advertising budget
- follow purchasing procedures

b) monitor revenues and expenses within established time frames, for example:

- sales reports should:
 - establish labour needs and costs
 - balance with service standards
- job/project costs
- variance history

I. Inventory Management Skills

■ SKILL 1. MAINTAIN INVENTORY



1.1 purchase materials, products, and services from suppliers

Why is this skill important?

- to maintain quality for customer
 - to have adequate product available at all times
 - to help set prices for products
 - to maintain cost controls
- a) follow purchasing procedures, e.g., purchasing deadline, delivery schedule, purchase orders
- b) order supplies, products, and services:
- negotiate prices wherever possible, e.g., high-volume items may be discounted
 - obtain quotes
 - requisition products internally, as needed
 - outline conditions of order, e.g., substitutions, shortages
 - document orders and quotes
- c) maintain good relations with suppliers and suppliers'/agents' representatives, for example:
- ensure that paperwork is completed on time, e.g., forward invoices for payment
 - follow up to ensure that payments are made on or before due date
 - contact supplier if special arrangements are necessary, e.g., arrangements for changed delivery time
 - contact suppliers regularly to obtain information about:
 - new items
 - promotions
 - recommendations

- provide constructive feedback
 - be ethical
- d) monitor suppliers' services periodically:
- check for problems
 - research alternate suppliers, if required
 - obtain competitive quotes on high-volume items

Notes:

- having set criteria for suppliers helps supervisor to monitor service
- be aware of corporate requirements, e.g., over certain dollar level, may need to get quotes from several potential suppliers to ensure best prices

Frequency:

- constant

Variations:

- in larger organizations, may be handled by purchasing department
- in some organizations, there will be schedule that indicates when suppliers are to be evaluated, e.g., annually
- remote areas have special challenges when accessing and purchasing products:
 - can change way skill is performed
 - can also prevent organization from accessing certain products

Conditions (limiting factors):

- internal barriers, such as tight timelines, could affect supervisor's ability to get best product for best price
- unco-operative or difficult suppliers can make skill difficult to perform



1.2 follow receiving procedures for physical inventory

Why is this skill important?

- to promote product availability
- to increase quality of items received
- to allow discrepancies in orders made and received to be identified
- to allow existence of back-up documentation for budget reconciliation

- a) compare invoice to purchase order:
 - check for price variations
- b) check goods received for, for example:
 - number of items, e.g., compare to quantity ordered
 - shortages:
 - confirm whether stock is back-ordered or needs to be reordered
 - substitutions
 - damage, spoilage, or poor quality
- c) ensure that product identification data is accurate, e.g., part numbers, appropriate sizing
- d) note irregularities on shipping documents:
 - initiate claim with supplier or carrier
- e) flag credit notes for follow-up action
- f) forward invoices for payment

Notes:

- inventory can be physical (e.g., goods) or conceptual, e.g., contracts, services

Frequency:

- as needed

Variations:

- some organizations will have pre-purchase agreements set up
- for organizations where goods are conceptual (e.g., destination management contracts), supervisor will need to ensure that customer is billed for all services before invoice goes out to supplier, e.g., all

meals booked at restaurant are guaranteed (regardless of those who actually show up)



1.3 follow storage procedures

Why is this skill important?

- to keep product current and organized
- to reduce spoilage
- to reduce risk of theft
- to protect safety and health of staff and customers

- a) store stock as required:
 - follow safe storage and handling procedures, e.g., refrigerate perishables at proper temperatures, follow Workers' Compensation Board (WCB) guidelines
 - rotate stock as necessary, e.g., use first in, first out (FIFO) rotation system
 - follow Workplace Hazardous Materials Information System (WHMIS) guidelines
- b) secure stock
- c) record new stock in inventory system, if required

Notes:

- not all organizations will have physical product (e.g., tour operator) but will have working/office supplies
- perishable products should be labeled according to date received and/or opened
- be aware of hazardous products and special storage requirements

Frequency:

- as needed, e.g., as material arrives
- may be organized seasonally



1.4 follow procedures for maintaining inventory

Why is this skill important?

- to improve awareness of costs of goods
- to improve security
- to provide basis for purchasing
- to control costs
- to provide basis for adjustment to prices
- to encourage smooth, consistent service
- to reduce down time
- to allow availability of products

a) for physical inventory:

- order products and supplies in quantities that can be sold or used in reasonable time frame:
 - identify key products and amount to have on hand at all times in order for business to be operational
 - consider turnover rate of merchandise
 - determine minimum and maximum stock levels
- receive products and supplies
- update system of inventory control, for example:
 - inventory sheets
 - requisition forms
 - bin cards
 - inventory book
 - point-of-sales system
- monitor inventory:
 - count inventory as required, e.g., monthly, annually:
 - >count inventory at beginning and closing of inventory period
 - calculate dollar value of beginning and closing inventories
 - investigate and rectify discrepancies, e.g., shortages, damage
 - document discarded items/waste
 - analyze slow-moving items:
 - >mark down or return, if necessary:
 - ~document any change in price

- rotate stock, e.g., use FIFO rotation system
- check dated items before use and take action as necessary, e.g., put on special, return for credit, discard
- review back orders and rain checks
- secure storage areas:
 - lock up high-cost items and hazardous products
- ensure proper storage conditions, for example:
 - control temperature, light, and humidity
 - keep clean, organized, and accessible
- reorder products and supplies as necessary
- review system annually to ensure that it is working as required:
 - adjust as necessary

b) for conceptual inventory:

- order products according to customers' needs
- negotiate terms of use
- receive purchase order or contract:
 - enter into system of operations
- monitor customer's adjustments (e.g., dates, locations) from point-of-order to delivery:
 - assess against supplier contract
 - make adjustments with supplier
 - match customers' changing needs with products
- monitor product on-site to ensure that it matches product order

Frequency:

- as needed

Variations:

- performance of skill will depend upon whether organization's inventory is physical or conceptual
- depending on size of operation, maintaining inventory may be formal or informal procedure
- size of operation and volume of business will dictate requirements and extent of supervisor's involvement

Supervisory Skills

Conditions (limiting factors):

- improper booking tools, poor tracking or documentation, or unco-operative suppliers can make skill difficult to perform

APPENDIX A

STANDARDS AND CERTIFICATION DEVELOPMENT PROCESSES

STANDARDS DEVELOPMENT PROCESS

There are essentially six steps to the standards development process:



The process is organized so that all participating provinces' and territories' industry members have an opportunity to provide equal input into the final standards. The first meeting, a **PROFILE MEETING**, is held in the host province/territory (participating provinces/territories negotiate the role of host). At this meeting, approximately 12 industry professionals, referred to as the Industry Validation Committee (IVC), are lead through an intensive two-day brainstorming session that provides the development team with a comprehensive inventory of the knowledge, skills, and attitude required to be considered competent in the occupation.

After the meeting, when all relevant information regarding what to know, be, and do to be an industry professional in this occupation has been collected, the development team compiles the information into a first draft of the standards. The draft is then mailed out for review to the host IVC and the corresponding committees in the participating provinces/territories.

After committees have had a chance to read through the draft standards, one member of the development team travels to each participating province/territory in order to facilitate the REVIEW MEETINGS. The purpose of the review meetings is to gather the members of the provincial/territorial committees together to share feedback and refine the standards.

The final meeting in the standards development process is a VALIDATION MEETING, held in the host province/territory. At this meeting, the host IVC members are asked to listen to and incorporate into the standards, or otherwise respond to, suggestions presented by the participating provinces/territories, as represented by the development team member who facilitated the review meeting in that province/territory.

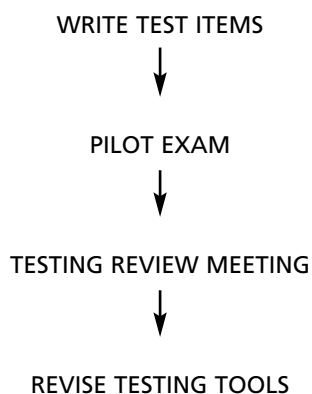
There are substantial revisions at this stage and the host IVC is ultimately charged with obtaining consensus from the group and for producing standards that accurately reflect the knowledge, skills, and attitude of a competent member of the occupation.

After the validation meeting, the development team makes the revisions and edits the standards document, which is then sent out to all committee members in the participating provinces/territories for their final ratification. Once ratified, the standards are deemed to be VALIDATED and are printed and made available to the industry.

Sector expertise is the key component of the standards and certification development processes. The standards development process effectively uses input from tourism sector professionals to produce realistic and comprehensive occupational standards. The process permits the development team to obtain the detailed data required to write measurable behavioural standards while maintaining sector ownership of the product. It provides the sector with a practical tool that can be used for human resource development. IVC members have a sense of ownership of the standards, as well as a more concrete understanding and appreciation of their own occupation.

CERTIFICATION DEVELOPMENT PROCESS

The certification development process uses the same principle of industry contribution as the standards development process does. An occupation opens for certification after completion of the following steps:



The development team writes multiple-choice test items, based on the information in the validated standards. The IVC and participating provincial/territorial committees augment and improve the authenticity of the test item bank by submitting as many items as they can.

The completed bank of test items (usually 300-500 items) is test-piloted across the participating provinces/territories with control and industry groups. The scores achieved generate statistics that reflect the validity and accuracy of the test items.

The meeting that takes the most time and produces the bulk of the testing tools for certification is the TESTING REVIEW MEETING. This three- or four-day meeting assembles three representatives from each participating province/territory in the host province or territory. The development team facilitates the meeting and ensures that each test item is reviewed and revised, that the performance review is analyzed, and that the skills and strategy that will become the industry evaluation are generated. Once the testing tools have been refined, finalized, and formatted, the occupation is deemed open for certification.

The certification process is accepted and recognized across Canada, which allows greater mobility for certified professionals. It also allows employers insight into a prospective employee's skills prior to hiring. Certification indicates that an individual has attained a level of skill and knowledge accepted by the industry, which can ultimately save an employer time and money in recruiting and/or training staff.

APPENDIX B

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Pam Allen, Provincial Museum, Edmonton, AB
Suzanne Amos, Amos Pewter, Mahone Bay, NS
Craig Anger, The Forzani Group Ltd., Orillia, ON
Robin Apel, Monk McQueens, Vancouver, BC
Scott Avery, The Forzani Group Ltd., Sudbury, ON
Linda Badcock, Department of Tourism, Culture and Recreation, St. John's, NF
Mike Baerwald, The Forzani Group Ltd., Saskatoon, SK
Puneet Bains, Earls, Surrey, BC
Perry Batke, Best Western Denham Inn & Suites, Leduc, AB
Jamie Behrems, The Forzani Group Ltd., Saskatoon, SK
June Bennett, Havana, Vancouver, BC
Gord Bergen, The Forzani Group Ltd., Winnipeg, MB
Jeff Birmingham, Fairmont Newfoundland, St. John's, NF
Jason Bond, Host Toronto, Mississauga, ON
Alain Bosse, Pictou Lodge Resort, Pictou, NS
Brenda Branch, Royal Botanical Gardens, Toronto, ON
Paula Brar, Indigo Books & Music Inc., Toronto, ON
Michelle Brazil, London Drugs Limited, Edmonton, AB
Jane Campbell, Rodd Charlottetown Hotel, Charlottetown, PE
Trish Carey, Fairmont Palliser, Calgary, AB
Brian Chalmers, BC Liquor Distribution Branch, Squamish, BC
George Chow, BC Liquor Distribution Branch, Vancouver, BC
Virginia Clarke, Wandlyn - Amherst, Amherst, NS
Catherine Clement, Novotel Downtown Toronto, Toronto, ON
Sandra Codd, Travelodge Canada, Calgary, AB
Midi Coker, Olde Bytowne B & B, Ottawa, ON
Deanne Collins, Telelink - The Call Centre Inc., St. John's, NF
Frank Curlew, Westmark Inn Beaver Creek, Beaver Creek, YK

Supervisory Skills



Eamonn Dunne, BC Liquor Distribution Branch, West Vancouver, BC
David Dusome, Museums Alberta, Edmonton, AB
Darlene Fedoroshyn, Canada Olympic Park, Calgary, AB
Alison Feldmann, BC Liquor Distribution Branch, Maple Ridge, BC
Carla Felicella, Rare Indigo, Vancouver, BC
Maggie Fiorante, Tourism Saskatchewan, Regina, SK
Eva Gates, Season's in the Park, Vancouver, BC
Andrew Gilchrist, Mayfair Golf & Country Club, Edmonton, AB
Rob Grand, Grassroots Inc., Toronto, ON
Tammy Henwood, Wandlyn - Amherst, Amherst, NS
Dean Hillier, A.T. Kearney Inc., Toronto, ON
Gina Holstead, City/Town of Kitchener, Kitchener, ON
Fred Huber, London Drugs Limited, Edmonton, AB
Deb Hunter, Mark's Work Wearhouse, Calgary, AB
Dave Kaiser, Best Western Denham Inn & Suites, Leduc, AB
Rob King, The Forzani Group Ltd., Edmonton, AB
Jennifer Kluthe, Sobeys Inc., Edmonton, AB
Pat Kristoff, BC Liquor Distribution Branch, Kelowna, BC
Ray Kruse, The Forzani Group Ltd., Calgary, AB
Suzanne Labrecque, Tourisme Québec, Montreal, QC
Serge Lagacé, NB Liquor/Alcohol N-B, Tracadie-Sheila, NB
Larry Laite, Mount Peyton Hotel, St. John's, NF
Robin Lalonde, BC Liquor Distribution Branch, Kelowna, BC
Lorrie Lancaster, Fort Calgary, Calgary, AB
Jim Larsen, London Drugs Limited, Kamloops, BC
Karen Ledrew-Day, Boyds Cove Beothuk Interpretation Centre, Lewisporte, NF
Roger Leroux, The Forzani Group Ltd., Barrie, ON
Patty Little, Holiday Inn, Vancouver, BC
Carol Logan, Prince George Hotel, Prince George, NS
Carolyn Luscombe, Eclectic Events International, Toronto, ON
Scott MacDonald, Cambridge Suites, Halifax, NS

Tina MacDonald, London Drugs Limited, Coaldale, AB
Shannon Mackay, BC Liquor Distribution Branch, Dawson Creek, BC
Gail Marrier, Henry's, Thornhill, ON
Marc-André Masse, Fédération des pourvoyeurs du Québec, Quebec, QC
Laine McColman, The Forzani Group Ltd., Edmonton, AB
Bruce McIntosh, Forster's Restaurant, Kamloops, BC
Dean McLaren, The Forzani Group Ltd., Lethbridge, AB
Brian Moore, National Car Rental, Halifax, NS
Donna Murphy, Société des établissements de plein-air du Québec (Sépaq), Parc de la Miguasha, QC
Leslie Muza, Kilmorey Lodge, Waterton, AB
Shelley Neufeld, BC Liquor Distribution Branch, Princeton, BC
Lisa O'Connell, Novotel Mississauga, Mississauga, ON
Denie Olmstead, Northern Frontiers Visitors Association, Yellowknife, NT
Karen Paisley, White Point Beach Resort, White Point, NS
Chad Pallesen, University of Calgary, Calgary, AB
Richard Pelletier, Listel Whistler Hotel, Whistler, BC
Aniek Perk, Ramada Inn, Abbotsford, BC
Shaun Perry, Sooke Harbour House, Sooke, BC
Susan Porter, London Drugs, Victoria, BC
Paul Rainville, BC Liquor Distribution Branch, Power River, BC
Jason Rende, London Drugs Limited, Kamloops, BC
Kathy Rigg, BC Liquor Distribution Branch, Kelowna, BC
Joanne Robbins, Port Elgin Chamber of Commerce, Port Elgin, ON
Victor Salcedo, 7 Eleven Canada, North Vancouver, BC
Murray Saunders, Season's in the Park, Vancouver, BC
Sheila Shaver, Ontario Place, Toronto, ON
Sheila Snelgrove, Gardiner Museum of Ceramics, Toronto, ON
Tammie Sorensen, The Gardens, Yellowknife, NT
Ron Starkie, BC Liquor Distribution Branch, Cache Creek, BC
Susan Stephen, West Edmonton Mall, Edmonton, AB
John Stolte, Toronto Board of Trade, Toronto, ON

Supervisory Skills



Jim Storie, Vancouver Trolley Co., Vancouver, BC

Brent Stovman, B.C. Liquor Store, Port Moody, BC

Keith Thomas, Parkway Mall, Saint John, NB

Bill Towndrow, Lunenburg Pro Hardware, Lunenburg, NS

Lawrence Wakeling, Coast Plaza at Stanley Park, Vancouver, BC

Peter Walton, London Drugs Limited, Surrey, BC

Basil Waugh, Chan Centre for the Performing Arts, Vancouver, BC

Ryan Webster, Kensington Riverside Inn, Calgary, AB

Elizabeth Wesley, Airport Authority, Calgary, AB

Christine Wilkes, Toys "R" Us, Kamloops, BC

Lynne Wilson, BC Liquor Distribution Branch, Prince George, BC

Alison Zalepa, Andres Wines Ltd., Niagara-on-the-Lake, ON