

# **Appendix S**

## **HOSPITALITY, LODGING, AND TOURISM YOUTH APPRENTICESHIP**

### **MANAGEMENT II UNIT 11**

## **Unit 11: ALL Pathways Management II Unit**

Competency

### **1. Identify & conduct a critical service audit**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Create an audit tool for service and/or area to be assessed
- Arrange for time of audit with management team
- Conduct audit with experienced staff from management team
- Summarize results of audit with management team
- Create an improvement plan with management if indicated
- Document corrective action and improvement plans and their outcome

Learning Objectives

- Identify critical service points in typical hospitality industry settings
- Define common quality improvement strategies to use for defining problems, identifying root causes, and creating improvement plans
- Explain how local, state, & national standards and company policies are used to create an audit checklist tool
- Explain the importance of implementing corrective actions and monitoring to ensure effectiveness

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

#### Competency

- 2. Perform general office duties such as filing, answering telephones, and handling routine correspondence**

#### Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

#### Performance Standard Criteria

**Performance will be successful when the learner:**

- File documents as required
- Prepare & print reports as required
- Answer phones pleasantly
- Route mail and messages as needed

#### Learning Objectives

- Discuss the importance of a proper opening greeting
- Describe voice qualities that are considered pleasant
- Explain the importance of customer service
- List the items that should be obtained when taking a phone message
- Describe common methods of filing documentation

#### **Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **3. Operate office equipment**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Operate computers with spreadsheet calculation fields
- Operate a 10 key adding machine if needed
- Operate a copy and fax machine if applicable

Learning Objectives

- Explain how spreadsheet computer software works to manage accounting functions
- Describe how fields in spreadsheets are programmed for calculations
- Point out the main components of a copy & fax machine
- Describe how to change paper & toner in a copy &/or fax machine
- Explain common troubleshooting techniques for common copy machine problems such as paper jams
- Describe the purpose of a 10 key adding machine in accounting departments

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **4. Maintain order forms, invoices & shipping documents**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Receive forms and documents for orders and receipts
- Compare packing slips from shipments with invoices for payment
- Match order forms with invoices, and record the necessary information
- Verify order received was complete, accurate and undamaged
- Resolve any discrepancies
- Enter records into databases

Learning Objectives

- Explain the technical systems utilized in purchasing and accounting
- List common ordering & shipping reports and forms
- Describe the purpose of order & shipment reconciliation
- Explain the process for resolving discrepancies with orders & shipments

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **5. Maintain inventory records**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Receive inventory records
- Follow up on any discrepancies between document count and actual count
- Enter records into databases
- Retrieve records
- Produce reports

Learning Objectives

- Explain the technical systems utilized in purchasing and inventory
- Describe different inventory systems
- List common reports critical to the inventory management system
- Explain the purpose of investigating inventory discrepancies

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **6. Assist to record cash & checks**

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- While assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Receive and record cash, checks, and vouchers
- Compile data from cashiers
- Verify and balance receipts
- Reconcile or note/report discrepancies found in records
- Prepare bank deposits

Learning Objectives

- Describe the parts of a check
- Explain cash and currency counterfeit verification measures
- Demonstrate how to complete checks and check stubs
- Explain the procedures for properly endorsing a check
- Describe the purpose of a bank statement
- Explain how to complete a bank deposit slip
- Discuss internal financial control processes
- Describe the purpose of bank deposit verification in accounting departments
- Explain how cash banks are issued and verified with cashiers

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **7. Assist to record and summarize financial data**

Performance Standard Condition

##### **Competence will be demonstrated**

- at the worksite
- While assisting a worksite professional

Performance Standard Criteria

##### **Performance will be successful when the learner:**

- Enter data into journals and ledgers
- Report & summarize data as required
- Check figures, postings, and documents for correct entry, mathematical accuracy, and proper codes
- Process journal entries
- Record receipts

Learning Objectives

- Identify basic budget forms
- Discuss the budget cycle
- Define operational cost
- Explain double-entry accounting
- Locate and define important concepts on balance sheets
- Describe and give examples of controllable costs, fixed costs, and variable costs in the hospitality industry
- Define cost/volume/profit relationships

**Comments:**



## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **8. Advertise or post job vacancies**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Assist to prepare the job notice including position, pay, hours, contact name/information, etc.
- Post the job notice according to company policy via email, bulletins, web-posting, newspaper, etc.
- Receive phone calls and/or in-person applications
- Explain application process if applicable
- Forward completed applications to appropriate worksite professionals

Learning Objectives

- Explain key elements of advertisements for job vacancies
- Describe how job descriptions are created
- Explain how job duties are determined
- Demonstrate understanding of legal interviewing processes
- State the function and importance of new employee orientation
- Describe common elements of orientation programs
- Explain the effect of equal opportunity laws on hospitality managers
- Identify implications of diversity
- List factors used to prioritize job candidates
- Develop a list of common interview questions
- Analyze non-verbal reactions

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **9. Process, verify, and maintain documentation relating to personnel activities**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Collate and file personnel documents
- Forward appropriate documents to worksite professionals for action
- Process applicant and employee assessment instruments
- Verify documentation for badges, passes, and identification cards
- Record data for employees such as addresses, absences, amount of sales or production

Learning Objectives

- Discuss the need for confidentiality when working with personnel information
- List common documents maintained in personnel files pertaining to performance, benefits, hours worked, etc.
- Discuss desired performance behaviors for workers

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **10. Compile and prepare reports pertaining to personnel activities**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Obtain information and/or forms submitted by staff
- Update applicable files and computer records as required
- Prepare reports as requested or required from staff information

Learning Objectives

- Describe common personnel functions and reports used by management
- Discuss the need for confidentiality when working with personnel information
- List effective techniques used in performance evaluations
- Critique customer service guidelines
- Identify types of and parts of contracts

**Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

#### Competency

**11. Assist to research, compile, and prepare reports, manuals, correspondence, and other information required by management or governmental agencies**

#### Performance Standard Condition

**Competence will be demonstrated**

- at the worksite
- While assisting a worksite professional

#### Performance Standard Criteria

**Performance will be successful when the learner:**

- Obtain information for required human resources reports
- Collate information in approved formats
- Prepare reports on human resources operations such as staffing, recruitment, training, and classifications

#### Learning Objectives

- List common reports required for regulatory compliance
- Describe the purpose of the operations manual, safety manual and other compliance documents
- Describe benefits and employment practices documents that must be maintained by a facility
- Discuss current legal standards for job performance and evaluation

#### **Comments:**

## **Unit 11: ALL Pathways**

### **Management II Unit**

Competency

#### **12. Update procedures, policies, and standards manual**

Performance Standard Condition

**Competence will be demonstrated**

- at the worksite

Performance Standard Criteria

**Performance will be successful when the learner:**

- Prepare copies of memos and pages of procedure updates
- Place/change updated pages in policy manuals
- Communicate work procedures and company policies to staff according to company requirements
- Implement corporate and departmental policies, procedures, and service standards in conjunction with management

Learning Objectives

- Describe the purpose of the policy & procedures manual
- Identify common components of a policy & procedures manual
- Discuss how changes to the policy & procedures manual are made and communicated to staff
- Explain the impact of policy & procedures on staff for training
- Discuss copyright laws and uses

**Comments:**