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: