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# INTRODUCTION

Food and beverage management is an essential function at each stage in the food and beverage value chain. These stages include the production, processing, procurement, manufacturing, research and development, marketing, sales and styling of products and services.

This document provides a comprehensive summary of the competencies (knowledge, attitudes and skills) that professionals around the world require to succeed in this growing and evolving field.

## THE SCOPE OF THE INTERNATIONAL STANDARDS

The Food and Beverage Management International Competency Standards focus on the competencies that are used in a range of food and beverage service management operations and job roles.

The standards reflect functions that are commonly performed in a variety of commercial establishments, including: hotels, conference centres, restaurants, pubs, bars, cafeterias, resorts, private clubs, casinos, lounges and nightclubs. The standards also reflect food and beverage management functions performed in establishments in the non-traditional food service industry, including: airports, stadiums, arenas, toll roads, theme parks, hospitals, colleges and universities, and business and industry enterprises.

The standards are generic and applicable to all aspects and contexts of food and beverage preparation and service.

Organizations can easily adapt the standards to meet the needs of their specific work environments, job roles and/or operations. The standards are a valuable resource to the thousands of food and beverage management professionals around the world, irrespective of their cultures, employment contexts and geographical regions.

## SETTING THE BAR HIGH

The standards are set at the level of expert performers. It is anticipated that expert performers have significant experience and education in all aspects of the management of food and beverage preparation and service operations.

Expert performers are goal-oriented individuals who are recognized for their superior competence and performance. They can develop creative and innovative solutions and design strategic management plans to reduce costs, while improving efficiency, productivity, overall customer experience, and product and service quality. They can also restructure organizations to target new markets, capitalize on product mix and service profiles, improve customer experiences, enhance competitiveness, and increase sales and profitability. Expert performers exhibit a high degree of autonomy and responsibility, and are capable of continuously improving their knowledge and skills.

## THE IMPORTANCE OF FOOD AND BEVERAGE MANAGEMENT

Food and beverage management is an important responsibility, considering all of the health and safety, economic, business, legal and environmental risks associated with the food and beverage industry. In light of these risks, a typical mandate of food and beverage management is:

1. To meet and exceed customers' needs and expectations by ensuring proper service standards, providing quality food and beverages and managing all aspects of operations.
2. To provide all customers with the highest quality of food and beverage experience by working as a team with all food and beverage outlets to ensure prompt, courteous and professional services.
3. To create high employee morale, low employee turnover rates and fast employee service times.
4. To seek profitability by decreasing all costs, maximizing sales in all outlets, adhering to budget and profit guidelines, creating promotions, and meeting or exceeding long- and short-range goals.

## A WIDE VARIETY OF MANAGEMENT CAREER OPTIONS

Food and beverage service management usually has three distinct levels:

1. Senior managers are responsible for managing the overall business environment with a particular focus on long-term planning and goals achievement.
2. Middle-level managers are responsible for liaising between senior managers, supervisors, employees and customers.
3. Supervisors link managers and employees and are directly involved in food and beverage production and service delivery.

Due to the diversity of the food and beverage sector, these management professionals may carry any number of job titles, including but not limited to:

- Banquet Manager
- Bar Assistant Manager
- Bar Manager
- Café Manager
- Cafeteria Manager
- Canteen Service District Manager
- Canteen Service Manager
- Catering Service Manager
- Club Foodservices Manager
- Dining Establishment Managing Supervisor
- Dining Room Manager
- Food and Beverage Service Manager
- Food Services Officer (Military)
- Food Services Steward (Military)
- Internet Café Manager
- Restaurant Assistant Manager
- Restaurant Manager
- Restaurateur
- Tearoom Manager

## KEY INDUSTRY TRENDS

Several mega trends have contributed to the rapid growth of the food and beverage sector. These same trends are now challenging food and beverage management. Among these trends are:

1. Social trends, including: an aging—yet growing—population, an emerging middle class and the changing role of women.
2. Technological trends, including: automation, digital integration, the development of digital skills and the growing importance of digital media strategies.
3. Economic trends, including: rising food prices, an increase in international competition and a proliferation of international events.
4. Rising customer expectations as a result of: the growth of niche markets (e.g. vegetarian, eat local, gluten-free, lactose-free), heightened expectations for quality of life, trends in preferences for eating out and demands for service excellence.
5. Environmental trends, including: sustainability, eco-friendly policies, corporate responsibility, and waste minimization and management.
6. Political trends, including: increased social dialogue (e.g. about working conditions, higher wages) and legislation changes.

To be successful in the international marketplace, individuals working in food and beverage management roles must adapt to the changing demands of the industry. Consequently, management may need to learn, develop and refine their skill sets.



# HOW ARE THE STANDARDS STRUCTURED?

## 1. MAJOR CATEGORIES

The Standards encompass nine major categories:

- Managing with engagement
- Managing business operations
- Managing financial resources
- Managing human resources
- Managing physical resources
- Managing provisioning of supplies
- Managing food and beverage preparation and service operations
- Managing customer service
- Managing compliance with applicable laws and regulations

## 2. SKILLS

Each major category contains skills that food and beverage service management may require.

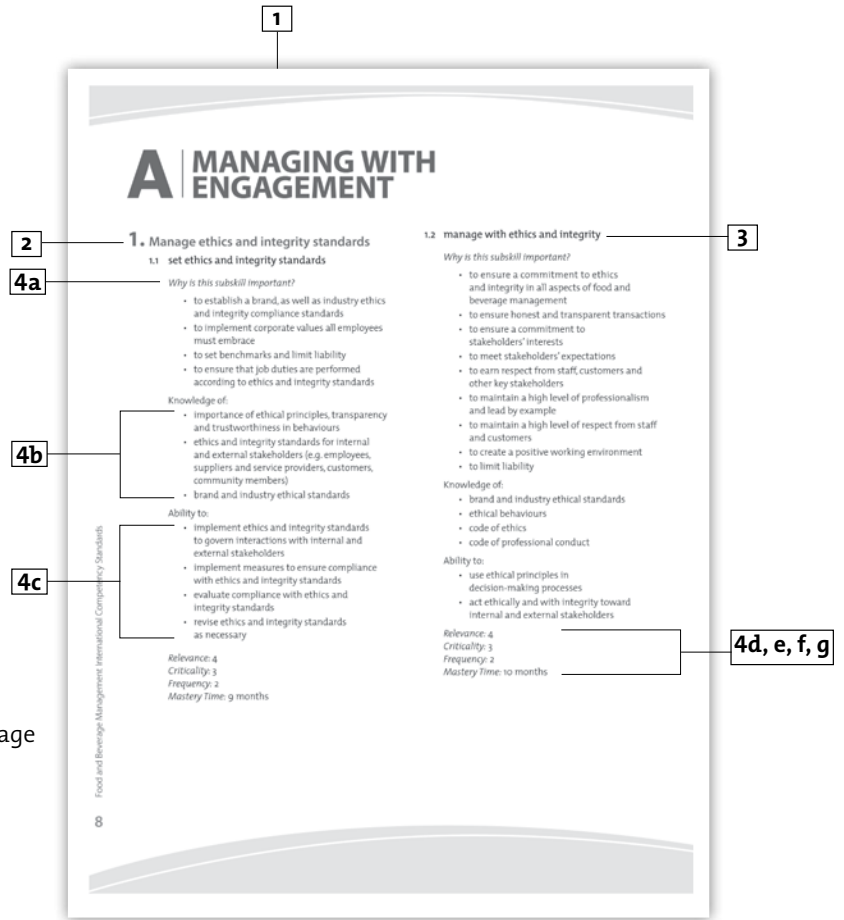
## 3. SUBSKILLS

Skills are further defined by a variety of subskills.

## 4. DETAILS OF THE STANDARD

The details of a standard describe the ways in which to perform the various subskills. Generally, the details for each subskill contain seven pieces of contextual information:

- An explanation of **why the subskill is important**.
- The underpinning **knowledge** a person requires to perform the subskill at a high level of proficiency.
- The **abilities** a person needs to perform the subskill at a high level of proficiency.
- Relevance** ratings that indicate the importance of performing the subskill. (The ratings are: 4: extremely important; 3: very relevant; 2: relevant; 1: somewhat relevant; and 0: not relevant.)





- e. **Criticality** ratings that indicate the significance of the potential consequences (with respect to health and safety, and work outcomes, materials, tools and equipment) of inadequate performance of the subskill. (The ratings are: 4: extremely critical; 3: very critical; 2: critical; 1: somewhat critical; and 0: not critical.)
- f. **Frequency** ratings that indicate the approximate regularity with which the subskill must be performed. (The ratings are: 4: monthly; 3: weekly; 2: daily; 1: occasionally; and 0: never.)
- g. **Mastery time** ratings that indicate the number of months people require to learn and become competent performing the subskill.



# HOW ARE STANDARDS USED?

The *emerit*® Food and Beverage Management International Competency Standards clearly outline what is required for success in this diverse industry. Specific groups that can benefit from the standards include students, educators, managers, employers and business owners.

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## Are you a FOOD AND BEVERAGE MANAGER?

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USE THE STANDARDS TO:

- learn more about the industry
- recognize your marketable skills
- enhance your performance
- plan your professional development
- increase your job mobility
- plan your career path

Note: your particular job context and level of responsibility will determine whether all or only selected competencies apply to you.

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## Are you a TRAINER, CURRICULUM DEVELOPER or PROGRAM MANAGER?

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USE THE STANDARDS TO:

- benchmark existing training programs
- create new vocational qualifications
- develop new training programs
- determine the kinds of research still necessary

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## Are you an EMPLOYER, OWNER or TEAM MANAGER?

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USE THE STANDARDS TO:

- identify workforce needs
- define job requirements
- create job descriptions
- write job advertisements
- assess potential employees
- provide orientation to new employees
- manage performance
- conduct performance assessments
- plan learning and development activities

# INCREASING RECOGNITION OF SKILLS

## SUPPORTING TRAINING MOBILITY

Designated organizations have developed industry-based standards to train and assess food and beverage management. National and international professional associations have also developed focused training and industry certifications to help meet their members' professional development needs.

The *emerit*® Food and Beverage Management International Competency Standards provide a foundation for writing common job descriptions and recruiting, training and retaining employees. The Standards describe the competencies required to plan and deliver internationally recognized training programs.

These Standards provide a common reference point or benchmark that enables employers, educational institutions and other organizations to recognize the prior learning individuals have in food and beverage management. The Canadian Tourism Human Resource Council encourages credential-granting bodies to engage in mutual recognition activities to determine credential equivalencies and implement reciprocity agreements. Such collaboration will help ensure that learning activities, courses and credentials are recognized across the industry.

## PROFESSIONAL CERTIFICATION

Professional certification is available based on the *emerit* Food and Beverage Management International Competency Standards.

The goal of any certification program is to identify and recognize individuals who meet a specified standard of competence. Certified employees enjoy recognition for proving their competence in food and beverage management, and increase their chances for job mobility and other employment opportunities. Employers have a trusted method for recognizing competent employees and building a strong workforce.

The certification examinations are based directly on the *emerit*® Food and Beverage Management International Competency Standards, and follow generally accepted testing principles. To become certified, industry professionals must meet experience requirements and complete—and pass—a series of assessments. Certification is voluntary and intended to recognize competence, not to regulate or control practices.

# A | MANAGING WITH ENGAGEMENT

## 1. Manage ethics and integrity standards

### 1.1 set ethics and integrity standards

*Why is this subskill important?*

- to establish a brand
- to implement corporate values all employees must embrace
- to set benchmarks and limit liability
- to ensure that job duties are performed according to ethics and integrity standards

Knowledge of:

- importance of ethical principles, transparency and trustworthiness in behaviours
- ethics and integrity standards for internal and external stakeholders (e.g. employees, suppliers and service providers, customers, community members)
- brand and industry ethics and integrity standards

Ability to:

- implement ethics and integrity standards to govern interactions with internal and external stakeholders
- implement measures to ensure compliance with ethics and integrity standards
- evaluate compliance with ethics and integrity standards
- revise ethics and integrity standards as necessary

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 9 months

### 1.2 manage with ethics and integrity

*Why is this subskill important?*

- to ensure a commitment to ethics and integrity in all aspects of food and beverage management
- to ensure honest and transparent transactions
- to ensure a commitment to stakeholders' interests
- to meet stakeholders' expectations
- to earn and maintain a high level of respect from employees, customers and other key stakeholders
- to maintain a high level of professionalism and lead by example
- to create a positive working environment
- to limit liability

Knowledge of:

- brand and industry ethics and integrity standards
- ethical behaviours
- code of ethics
- code of professional conduct

Ability to:

- use ethical principles in decision-making processes
- act ethically and with integrity toward internal and external stakeholders

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 10 months

### 1.3 exhibit professionalism in conduct

*Why is this subskill important?*

- to promote the image of one's brand and corporate values
- to earn the respect of employees and key stakeholders
- to create a positive work environment
- to lead by example

Knowledge of:

- brand and industry standard codes of conduct
- importance of professional image

Ability to:

- display professional characteristics
- act according to the goals, policies, procedures, rules and regulations of one's organization
- act as a role model
- implement standard codes of conduct
- monitor compliance with standard codes of conduct
- take corrective actions for non-compliance when necessary

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 3 months



# A | MANAGING WITH ENGAGEMENT

## 2: Demonstrate leadership

## 2. Demonstrate leadership

### 2.1 provide leadership

*Why is this subskill important?*

- to inspire employees
- to provide a clear vision for employees
- to ensure that all parties work as a cohesive team to improve customers' experiences
- to maintain high standards
- to promote a positive work environment
- to minimize turnover
- to give employees a sense of responsibility and ownership

Knowledge of:

- different leadership styles
- the positive effects of good leadership on organizational and employee performance
- cultural diversity

Ability to:

- lead by example
- adapt leadership style as necessary
- assess the needs and motivations of individual team members
- assess the strengths and weaknesses of individual team members
- communicate team goals
- delegate tasks
- maintain open lines of communication
- solicit and respond to employee suggestions and concerns
- share knowledge and expertise
- involve employees in the decision-making process
- adhere to policies and to short- and long-term strategies
- strive to continually improve all aspects of business

*Relevance:* 4

*Criticality:* 4

*Frequency:* 2

*Mastery Time:* 17 months

### 2.2 engage employees to improve productivity

*Why is this subskill important?*

- to increase productivity and sales
- to promote efficient performances that are essential for the successful achievement of individual and organizational goals
- to ensure that employees understand and accomplish tasks in a timely manner while meeting quality standards

Knowledge of:

- brand standards and industry best practices and trends
- productivity metrics
- motivational techniques
- ways to improve productivity

Ability to:

- implement brand standards and industry best practices
- develop productivity metrics
- inform employees of expectations
- empower stakeholders
- motivate employees
- provide a work environment conducive to productivity improvement
- measure productivity
- provide timely feedback on performance
- provide rewards and incentives for productivity improvement

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 6 months

### 2.3 promote continuous improvement

*Why is this subskill important?*

- to motivate people to excel and achieve optimum performance
- to encourage employees to participate in formal and informal learning
- to promote service excellence
- to enhance customer experiences and satisfaction

Knowledge of:

- processes for continuous improvement
- root cause analysis
- statistical analysis
- strategies for monitoring and identifying areas in need of improvement

Ability to:

- implement a process for developing, discussing and presenting improvement ideas
- process and interpret statistical information
- engage employees in improvement strategies
- define areas in which work practices, services or products require improvement
- identify opportunities for improving work practices, services or products

*Relevance:* 4

*Criticality:* 4

*Frequency:* 3

*Mastery Time:* 10 months

### 2.4 manage stakeholder relationships

*Why is this subskill important?*

- to develop and maintain a collaborative climate in which to work and conduct business transactions
- to promote customer loyalty
- to facilitate seamless communication channels
- to monitor and address needs, concerns and issues

Knowledge of:

- internal stakeholders (e.g. department heads)
- external stakeholders (e.g. vendors, suppliers)
- stakeholder expectations and objectives
- needs sensing, assessment and analysis
- internal and external communication channels

Ability to:

- build and maintain internal and external stakeholder relationships
- communicate with stakeholders
- define stakeholder expectations and objectives
- assess and analyze stakeholder needs
- engage stakeholders

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 13 months

### 2.5 manage change

*Why is this subskill important?*

- to keep up with technological advances
- to stay ahead of competitors
- to improve food and beverage production and services continuously
- to maximize opportunities for profitability and gains
- to ensure flexibility and adaptability in a changing market environment
- to maintain or gain a business advantage

Knowledge of:

- major forces underpinning change
- implications of change
- strengths, weaknesses, opportunities and threats (SWOT) analysis
- political, economic, social, technology and human resource analysis
- change-management techniques
- change-management plans



# A | MANAGING WITH ENGAGEMENT

## 2: Demonstrate leadership

- agents of change (e.g. departments of human resources, finance, training, operations, research and development)

Ability to:

- keep abreast of change-management processes
- define criteria for change
- determine benefits of change
- develop quantitative and qualitative methods for measuring the costs and benefits of change
- develop business metrics for change (e.g. benchmarks, best practices, scorecards for change)
- define goals and objectives of change
- define products, services and standards to be changed
- develop a change-management plan
- manage the implementation of change
- engage stakeholders in change
- identify and remove obstacles to change
- monitor market trends to identify threats, opportunities and drivers of change in relation to brand standards and industry best practices
- build on the results of successful change initiatives
- use metrics to audit change-management plans
- report on the results of change-management plans

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 15 months

### 2.6 manage time

*Why is this subskill important?*

- to be effective and efficient
- to achieve goals
- to ensure the timely accomplishment of tasks
- to avoid undue delays in meeting deadlines
- to achieve optimum productivity
- to ensure that all tasks get the time and attention they need and deserve
- to deliver on a brand proposition daily

Knowledge of:

- time management techniques (e.g. time allocation, prioritizing)
- planning and scheduling (e.g. project plan)
- time management tools (e.g. critical path)
- personal knowledge management (PKM) (e.g. perfectionist, avoider, procrastinator)

Ability to:

- set short- and long-term objectives
- estimate time requirements
- monitor progress against projections
- use digital tools and software applications
- apply management techniques (e.g. prioritize tasks, organize task lists)

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 6 months

### 2.7 delegate work

*Why is this subskill important?*

- to manage and use time efficiently
- to facilitate the simultaneous execution of multiple tasks or projects
- to mentor staff who have potential to move into leadership positions
- to enable staff to develop new competencies





- to empower staff to take responsibilities
- to increase staff morale
- to reduce stress and workload

*Relevance: 3*

*Criticality: 3*

*Frequency: 2*

*Mastery Time: 5 months*

Knowledge of:

- conditions required for successful delegation (e.g. staff competencies and traits)
- accountability (e.g. ways to ensure success, empowerment, responsibility)
- opportunities for delegation (e.g. barriers and facilitators)
- communication skills

Ability to:

- identify tasks to be delegated
- delegate tasks according to staff qualifications and experience
- articulate delegated tasks (e.g. intent, purpose, content)
- outline expectations for deadlines and desired results
- ensure that staff understand task expectations
- monitor tasks in progress and provide feedback

### 2.8 solve problems

*Why is this subskill important?*

- to improve efficiency
- to minimize loss
- to reduce mistakes
- to increase customer satisfaction
- to ensure the achievement of business objectives
- to ensure the quick and consistent resolution of problems
- to ensure an uninterrupted delivery of service to customers

# A | MANAGING WITH ENGAGEMENT

## 3: Keep up to date through professional development

Knowledge of:

- systematic approaches to solving problems (e.g. fishbone analysis, root-cause analysis)
- problem solving techniques (e.g. listening, brainstorming, open forum)
- characteristics of problems (e.g. complexity, opacity)
- constraints (e.g. time, window of opportunity, cost)

Ability to:

- characterize problems (e.g. technical, human, system, organizational)
- differentiate between problems and symptoms
- review and assess different courses of action
- consider multiple perspectives in the decision-making process
- select solution options
- implement selected solutions
- monitor and review the effectiveness of implemented solutions

*Relevance: 4*

*Criticality: 3*

*Frequency: 2*

*Mastery Time: 6 months*

## 3. Keep up to date through professional development

### 3.1 determine professional development needs

*Why is this subskill important?*

- to improve knowledge, skills and attitudes
- to keep knowledge and skills current
- to advance in career
- to set an example for staff
- to prevent skills obsolescence
- to ensure that high standards of quality are met through experience and training
- to nurture staff loyalty and reduce turnover
- to adapt to changing business environments and evolving customer needs

Knowledge of:

- the expectations of one's organization
- brand standards and industry best practices and trends
- training needs assessment
- personal strengths and weaknesses

Ability to:

- review personal skill set



- identify personal short- and long-term training needs
- assess current and future professional development needs
- set personal goals for professional development
- establish a development plan to address personal training needs

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 9 months

### 3.2 participate in professional development

*Why is this subskill important?*

- to improve and keep knowledge and skills current
- to advance in career
- to remain in touch with current business and industry trends
- to keep up with technological advances
- to pursue lifelong learning opportunities

Knowledge of:

- personal strengths and weaknesses
- areas in need of further development to meet future skills requirements
- learning organizations, institutions and qualifications
- personal learning style
- advantages and disadvantages of different types of professional development activities

Ability to:

- engage in training and development activities
- assess personal performance
- assess current trends and best practices
- engage with professional associations
- engage in formal and informal learning opportunities (e.g. networking with peers)

- access current information sources (e.g. trade and non-trade media)
- assess the effectiveness of development activities
- review and update personal professional development goals

*Relevance:* 3

*Criticality:* 2

*Frequency:* 3

*Mastery Time:* 7 months

## 4. Promote sustainability

### 4.1 promote triple bottom-line accounting and reporting

*Why is this subskill important?*

- to establish efficient and effective financial operation methods
- to make sustainability a key performance indicator of corporate social responsibility
- to devise strategic plans that reflect multiple perspectives
- to ensure the commitment of one's organization to long-term sustainability
- to maintain and record justifiable and achievable results
- to meet the expectations and interests of a range of stakeholders

Knowledge of:

- brand standards and industry best practices and trends
- financial sustainability
- social sustainability
- environmental sustainability
- systems thinking

Ability to:

- adhere to legislation to protect the environment, promote fair business practices and safeguard human rights

# A | MANAGING WITH ENGAGEMENT

## 4: Promote sustainability



- demonstrate leadership on issues of sustainability
- determine the return-on-investment of sustainability
- promote the greening of the food and beverage management (FBM) sector
- promote corporate responsibility to reduce the ecological footprint of one's organization
- promote triple bottom-line reporting
- evaluate the impacts and consequences of actions taken
- apply systems thinking techniques
- recognize the interdependence of environmental, economic and social systems

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 11 months

### 4.2 promote sustainable practices

*Why is this subskill important?*

- to reduce environmental impact
- to minimize resource waste and the carbon footprint of one's organization

Knowledge of:

- brand standards and industry best practices for, and trends in, sustainable management
- best practices for waste minimization and management
- facility limitations
- contingency planning

Ability to:

- plan a sustainable practices strategy
- engage stakeholders (e.g. employees, customers, owners, local community members) in sustainable practices

- promote shared responsibility for efficient resource use
- promote energy conservation
- promote the use of renewable resources
- promote the reduction of the carbon footprint of one's organization
- promote the reduction of waste
- promote the use of local products
- evaluate and update a sustainable practices strategy
- communicate the progress and achievements of greening initiatives

*Relevance:* 2

*Criticality:* 2

*Frequency:* 2

*Mastery Time:* 11 months

- internal resources (e.g. departments of human resources, information technology, finance, marketing)
- obstacles to effective communication
- intellectual property rights

Ability to:

- develop internal communication strategies
- implement internal communication strategies
- assess the effectiveness of internal communication strategies
- revise internal communication strategies as needed

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 8 months

## 5. Manage communication functions

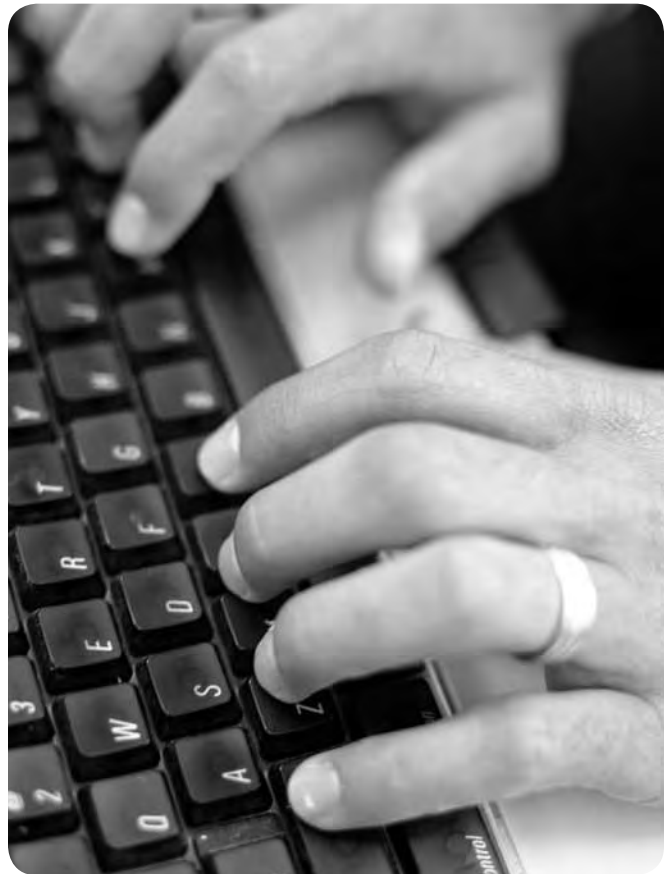
### 5.1 manage internal communications

*Why is this subskill important?*

- to keep brand integrity
- to ensure brand consistency in standards
- to ensure all parties understand common goals
- to use digital technology effectively to communicate
- to ensure effective and efficient communication strategies and systems
- to establish communication protocols
- to minimize clutter and redundancy in communication

Knowledge of:

- brand standards and industry best practices for, and trends in, internal communications
- effective communication strategies
- types of internal communication channels (e.g. intranet, newsletter, employee handbook)



# A | MANAGING WITH ENGAGEMENT

## 5: Manage communication functions

### 5.2 manage external communications

*Why is this subskill important?*

- to keep brand integrity
- to ensure brand consistency in standards
- to ensure all parties understand common goals
- to use digital technology effectively to communicate
- to ensure effective and efficient communication strategies and systems
- to establish communication protocols
- to minimize clutter and redundancy in communication

Knowledge of:

- brand standards and industry best practices for, and trends in, external communications
- effective communication strategies
- types of external communication channels (e.g. website, advertisements, press releases)
- external resources (e.g. marketing and public relations agencies)
- obstacles to proper communication
- business assets (e.g. privacy issues, laws and regulations)

Ability to:

- develop external communication strategies
- assess external communication costs
- implement external communication strategies
- communicate with key stakeholders (e.g. suppliers, customers)
- use a variety of external communication channels and tools
- assess the effectiveness of external communication strategies
- revise external communication strategies as needed

*Relevance: 3*

*Criticality: 3*

*Frequency: 2*

*Mastery Time: 8 months*

# B | MANAGING BUSINESS OPERATIONS

## 6. Develop corporate strategies

### 6.1 plan corporate strategies

*Why is this subskill important?*

- to provide overall direction for achieving business goals
- to ensure that energy and resources are focused on priority areas
- to improve business operations
- to articulate strategies and anticipated outcomes clearly

Knowledge of:

- strategic planning
- methods of developing management strategies
- planning by objectives (e.g. new business development)
- management philosophy (e.g. using business metrics, brand positioning)
- customer-focused methodology (e.g. creating ambiance of authenticity, earning customer loyalty)
- various management strategy models

Ability to:

- analyze the corporate culture
- apply management theories (e.g. customer relations management)
- apply corporate mission, vision and core value statements
- apply brand strategy
- develop business metrics (e.g. internal rate of return)
- formulate corporate strategies

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 17 months



### 6.2 implement corporate strategies

*Why is this subskill important?*

- to adapt to a changing business environment and the needs of customers
- to ensure profitability and company growth
- to ensure brand integrity
- to standardize operations

Knowledge of:

- change-management plans (e.g. communication flow, stakeholder engagement)
- implementation strategies (e.g. SWOT analysis; political, economic, social, technological and training analysis (PESTT))
- business metrics

Ability to:

- develop an implementation plan
- communicate an implementation plan
- train relevant stakeholders
- measure performance (e.g. plan execution, employee performance, business metrics)
- revise strategies (e.g. follow through)

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 17 months



# B | MANAGING BUSINESS OPERATIONS

## 7: Develop the business plan

### 7. Develop the business plan

#### 7.1 analyze business opportunities

*Why is this subskill important?*

- to take advantage of the market
- to provide grounds for strategy formulation
- to promote growth and innovations
- to increase business share
- to maximize profitability and identify desirable outcomes
- to determine new product and service opportunities

Knowledge of:

- situational analyses
- the vision and mission of one's organization
- corporate goals and objectives
- feasibility analysis (e.g. SWOT analysis)
- market positioning
- the products and services of one's organization
- financial modelling
- business models (e.g. franchises, joint ventures)

Ability to:

- conduct market research
- analyze market research (e.g. internal business environments, external business)

*Relevance:* 4

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 11 months

#### 7.2 prepare a business plan

*Why is this subskill important?*

- to plan future capital outlays, finances and other resources
- to achieve business goals
- to communicate and monitor strategies, tactics and objectives

Knowledge of:

- the purpose of business plans and business planning
- capital markets (e.g. banks, venture capitalists)
- business plan formats
- the contents of a business plan
- business operations
- marketing strategies
- project management tools
- financial modelling (e.g. profit and loss statements, net present value, internal rate of return)

Ability to:

- synthesize and use relevant information
- compile a draft business plan (e.g. executive summary, financial summaries)
- finalize a business plan (e.g. consult investors, confirm details)

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 11 months



## 8. Manage projects

### 8.1 plan a project

*Why is this subskill important?*

- to identify and schedule project activities
- to identify deadlines and milestones
- to estimate the resources necessary for project implementation
- to assess risks and develop contingency plans

Knowledge of:

- project negotiation strategies
- analytical needs analysis tools (e.g. Pareto, SWOT)
- project requirements and specifications
- project management systems and tools
- project planning and scheduling techniques
- problem and risk management
- resource estimation and allocation
- estimating and cost control

Ability to:

- estimate necessary resources
- create a work-breakdown structure
- schedule project activities
- establish timelines and milestones
- determine project outputs and deliverables
- generate Gantt charts
- allocate resources to project activities

*Relevance:* 4

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 10 months

### 8.2 supervise project implementation

*Why is this subskill important?*

- to monitor project activities
- to monitor quality
- to ensure the appropriate use of resources
- to ensure the timely completion of project activities
- to ensure the timely submission of project deliverables

Knowledge of:

- project management
- project supervision
- project evaluation

Ability to:

- determine the work to be performed within set time constraints
- estimate productivity levels
- use project management planning tools
- schedule operations in a logical sequence
- adjust schedules to changing conditions
- plan for contingencies
- monitor work progress against schedules
- develop a recovery plan
- update schedules
- manage the quality of outputs and deliverables
- review project effectiveness

*Relevance:* 4

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 7 months

# B | MANAGING BUSINESS OPERATIONS

## 8: Manage projects

### 8.3 conduct meetings

*Why is this subskill important?*

- to provide a forum in which staff can share opinions and new ideas
- to create a common understanding of expectations
- to keep staff informed of company policies, procedures, events, promotions, welfare and general information
- to resolve issues
- to create a team atmosphere

Knowledge of:

- brand standards and industry best practices for, and trends in, conducting meetings
- types of meetings
- meeting planning
- meeting facilitation strategies
- tools to support meetings (e.g. digital recordings of meetings, virtual meeting software)

Ability to:

- develop protocols and procedures for conducting meetings
- plan meetings
- set meeting parameters
- facilitate meetings
- report on meeting results (e.g. minute taking, action points, communication with key stakeholders)
- follow up on action points
- evaluate meetings
- improve the effectiveness of meetings as needed

*Relevance: 3*

*Criticality: 3*

*Frequency: 3*

*Mastery Time: 7 months*



## 9. Lead research and development strategies

### 9.1 develop new concepts for products and services

*Why is this subskill important?*

- to adapt to a changing business environment and evolving customer tastes
- to ensure a competitive edge within the industry and unique selling points
- to ensure profitability and company growth
- to ensure brand integrity and consistency
- to gain or maintain industry leadership
- to adopt innovative ways to improve departments

Knowledge of:

- research and development procedures and systems (e.g. supply chain)
- business models and strategies
- internal and external resources
- business plans
- research and development plans
- intellectual property (e.g. trademarks, copyrights)

Ability to:

- engage internal and external stakeholders
- facilitate the research and development process
- lead the generation of new concepts and ideas
- formulate new concepts for products and services
- ensure the feasibility of new concepts for products and services
- measure potential demand, pricing, anticipated results, profitability, the competitive environment and sustainability
- revise other plans as needed (e.g. financial plans)

- create an implementation plan
- plan project development

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 15 months

### 9.2 establish a funding and financial structure

*Why is this subskill important?*

- to develop a governing structure and financial plan
- to select fundraising strategies

Knowledge of:

- financial models (e.g. licensing, franchising, joint ventures, taxation requirements)
- operating structures (e.g. board of directors, management contract)
- management structures
- fundraising purposes, sources, methods and strategies
- venture capital
- regulatory and licensing requirements (e.g. zoning codes)

Ability to:

- determine appropriate financial structures
- identify sources and methods of fundraising
- identify the advantages and disadvantages of various sources of funding
- develop a financial plan
- establish a governing structure (e.g. board of directors)
- determine a course of action (e.g. merger, acquisition, roll-out)

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 17 months

# B | MANAGING BUSINESS OPERATIONS

## 10: Manage business risk

### 9.3 manage the financial transformation of a business

*Why is this subskill important?*

- to deal with all legal, financial and personnel matters
- to minimize damages and maximize benefits

Knowledge of:

- the impact of financial, social, political and market variables
- financial audits
- financial transformation options (e.g. outsourcing, business closure, filing for bankruptcy)

Ability to:

- conduct financial impact analysis including, among others:
  - risk management
  - market and brand positioning
  - product quality
- analyze financial performance (e.g. cost of sales)
- define transformation options (e.g. merger, acquisition, divestiture, filing for bankruptcy)
- select an appropriate financial transformation strategy
- implement a financial transformation strategy
- develop employees' out-placement plan
- adopt mitigation strategies
- manage a selected transformation option

*Relevance:* 2

*Criticality:* 2

*Frequency:* 2

*Mastery Time:* 14 months

## 10. Manage business risk

### 10.1 assess risks

*Why is this subskill important?*

- to determine the possible losses, damages, costs and expenses an operation may incur
- to identify the most probable threats, analyze the related vulnerabilities and evaluate existing physical and environmental security
- to monitor regulatory elements that affect the business environment
- to identify competitive trends

Knowledge of:

- types of business risks (e.g. competition, health codes, food safety, legal, staff turnover)
- the impact of different types of business risks
- organizational capabilities (e.g. human resources, legal, security, health and safety)
- research methods (e.g. ways to investigate a legal issue)
- risk assessment tools (e.g. policies and procedures)

Ability to:

- identify current and foreseeable risks
- consult key stakeholders
- develop tools to assess risks
- determine the consequences of risks
- document the risk assessment process and proposed control actions

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 12 months

### 10.2 eliminate or control business risk

*Why is this subskill important?*

- to minimize damages and maximize benefits
- to ensure systems and processes are in place to prevent losses, damages, costs and expenses
- to ensure the effective management of business risks
- to apply preventive measures to eliminate or reduce the impacts of risk
- to plan for business recovery



Knowledge of:

- risk management plans
- risk management techniques
- documentation requirements (e.g. completing an accident report)
- legal and insurance policies and procedures

Ability to:

- audit identified risk issues
- eliminate risk where possible
- determine specific control measures
- implement risk control measures (e.g. skid-resistant shoes for servers)
- communicate requirements
- conduct relevant training (e.g. alcohol awareness)
- assess the effectiveness of risk control measures (e.g. test sprinkler systems and fire extinguishers)
- develop risk management reports and risk profiles
- monitor risks on an ongoing basis
- recommend improvements to risk management practices
- analyze the return-on-investment of business decisions and actions

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 16 months

# B | MANAGING BUSINESS OPERATIONS

## 11: Analyze outsourcing opportunities

### 11. Analyze outsourcing opportunities

#### 11.1 conduct a feasibility assessment of outsourcing

*Why is this subskill important?*

- to provide services and products that do not fall within the core business of the enterprise
- to focus on core competencies
- to cut unnecessary expenses

Knowledge of:

- the business model of one's organization
- the benefits of outsourcing
- the effects of outsourcing
- how to write a request for proposal (RFP)
- the vendor marketplace
- managing vendors
- required external and internal resources (e.g. lawyers, human resources department)
- legal requirements
- contractual obligations of outsourcing

Ability to:

- define opportunities for outsourcing
- assess the merits of outsourcing
- qualify vendors
- assess the effects of outsourcing on the quality of products and services
- define logistics (e.g. security, delivery times)
- identify the impact of outsourcing on human resources (e.g. labour contracts)
- define risks and contingencies (e.g. insurance, alternative suppliers, legal culpability)

Relevance: 3

Criticality: 2

Frequency: 2

Mastery Time: 17 months

#### 11.2 implement outsourcing plans

*Why is this subskill important?*

- to adopt new business models
- to maximize operations through a third-party
- to manage and control risk
- to monitor the progress and outcomes of outsourcing initiatives

Knowledge of:

- the business model of one's organization
- the content and format of an outsourcing plan
- outsourcing obligations
- terms in outsourcing contracts
- logistics
- risk management (e.g. impact on human resource requirements)
- contractual obligations (e.g. collective bargaining agreements)
- how to write a request for proposal (RFP)
- required internal and external resources (e.g. lawyers, human resources department)

Ability to:

- assess outsourcing needs
- develop an RFP
- broadcast an RFP
- evaluate proposals
- negotiate terms with a selected vendor
- award a contract
- develop an outsourcing plan
- consult with internal departments (e.g. legal, human resources)
- write the details of an outsourcing plan
- review an outsourcing plan against goals and objectives

- implement an outsourcing plan
- monitor quality requirements (e.g. inventory control, cost analysis)

*Relevance:* 2

*Criticality:* 2

*Frequency:* 2

*Mastery Time:* 17 months

### 11.3 manage assets

*Why is this subskill important?*

- to reduce spending and increase profitability
- to enhance knowledge of capital assets and their respective values
- to benchmark organizational performance against business objectives and standards
- to facilitate an organized, logical and evidence-based decision-making approach

Knowledge of:

- corporate objectives (e.g. financial performance, business metrics, brand management)
- reporting requirements
- asset management
- asset planning

Ability to:

- conduct comparative analyses
- monitor performance against corporate objectives
- consult internal and external stakeholders and make recommendations
- develop and execute an action plan
- monitor progress and test results
- report on outcomes
- adjust the business model of one's organization as needed

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 13 months

## 12. Manage compliance with franchisee, licensee and legislative requirements

### 12.1 develop a compliance strategy

*Why is this subskill important?*

- to comply with franchisee obligations
- to comply with legislative requirements

Knowledge of:

- franchisee obligations and legislative requirements
- codes of practice
- the requirements of government and licensing agencies

Ability to:

- identify obligations under franchising agreements
- identify relevant legislative requirements
- interpret obligations and legislative requirements
- devise a compliance strategy
- validate a compliance strategy with a franchisor

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 9 months

### 12.2 implement a compliance strategy

*Why is this subskill important?*

- to adapt brand operational standards to uniform franchise offering circular (UFOC) or license agreement requirements
- to devise and validate a compliance strategy

Knowledge of:

- legal provisions that govern franchises
- the obligations of a franchisor and franchisee

# B | MANAGING BUSINESS OPERATIONS

## 12: Manage compliance with franchisee, licensee and legislative requirements

- UFOCs or license agreements
- how to implement UFOC or license agreement compliance audits
- how to re-engineer brand operational standards to address UFOC or license agreement compliance issues

### Ability to:

- implement all UFOC brand standards or license agreements across an organization
- interpret obligations and legislative requirements
- devise a compliance strategy and audits
- validate a compliance strategy with a franchisor
- conduct a yearly audit of franchisor UFOC or license agreements to ensure compliance
- re-engineer operating standards within a company to ensure their compliance with UFOC or license agreement standards

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 10 months

### 12.3 undertake scheduled compliance audits

#### *Why is this subskill important?*

- to devise a compliance monitoring strategy
- to address areas of non-compliance

#### Knowledge of:

- ways to identify instances of non-compliance
- compliance verification strategies
- compliance monitoring techniques
- criteria for assessing compliance
- tools for assessing compliance

#### Ability to:

- communicate compliance requirements to employees
- provide training to facilitate compliance
- develop compliance verification strategies
- conduct compliance checks
- record the results of compliance checks
- analyze reasons for non-compliance
- take action to address instances of non-compliance

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 6 months





## 13. Implement marketing strategies

### 13.1 conduct a situational analysis

*Why is this subskill important?*

- to gather evidence-based information for decision making
- to make recommendations regarding budgets and marketing resources
- to be aware of actual and potential competition
- to stay alert to the need to change

Knowledge of:

- customer profiles (e.g. demographics, psychographics)
- competitors
- market positioning
- marketing plans
- business metrics (e.g. revenue, average check)
- customer relations management (CRM)
- performance review methodologies
- comparative market analysis

Ability to:

- collect information on the business environment (e.g. industry trends, competitors, customer trends, technological development)
- collect information on the political, economic, social, technological and human resource environments
- analyze collected information
- identify market constraints (e.g. legal, ethical, environmental)
- analyze the impact of market constraints
- analyze the effectiveness of current and past marketing strategies
- review historical data (e.g. surveys, evaluations, budgets)

- assess current capabilities and resources, including:
  - customer base
  - business values
  - business direction
  - core activities of one's organization
  - underperforming products and services
- analyze the causes of the underperformance of products and services
- identify further business opportunities (e.g. new products and services)
- analyze risk factors (e.g. price, changes in the labour force, population, economic activity)
- summarize the results of a situational analysis
- draw conclusions and make recommendations regarding budgets and resources

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 12 months

### 13.2 implement an integrated marketing plan

*Why is this subskill important?*

- to provide an overall direction for achieving business goals
- to increase market share and sales
- to create a measurable action plan
- to set competitive prices
- to define market differences
- to introduce new products or services
- to stimulate demand in a down period
- to enhance the operation's image
- to ensure profitability and company growth
- to ensure brand integrity and consistency
- to gain or maintain industry leadership
- to target marketing efforts to key audiences
- to determine how to communicate a concept, product or service to the marketplace
- to set a marketing budget

# B | MANAGING BUSINESS OPERATIONS

## 13: Implement marketing strategies

Knowledge of:

- marketing strategy models (e.g. use of social media)
- branding
- the components of a marketing plan
- market planning (e.g. target market, situational analysis, goals and objectives, market positioning)
- marketing mediums (e.g. advertising)
- integrated marketing communications (e.g. harmonization of messages)
- marketing cost-benefit analysis
- internal and external resources
- legal, cultural and ethical considerations

Ability to:

- analyze information (e.g. market survey, environmental analysis, marketing mix)
- determine market segmentation
- identify target customers
- match existing products and services to target customers

- develop additional products and services
- develop an integrated marketing plan
- conduct a revenue generation and cost analysis
- prepare contingency plans
- set schedules and timelines
- allocate finances
- develop marketing and communications materials (e.g. social media, print media)
- implement an integrated marketing plan
- compare the results of a marketing plan to objectives
- adjust a marketing plan as needed
- report on the results of a marketing plan

*Relevance:* 4

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 16 months



# C | MANAGING FINANCIAL RESOURCES

## 14. Administer budgets

### 14.1 prepare budgets

*Why is this subskill important?*

- to prepare a proposed outlay of company finances
- to include a financial module in the corporate strategy and business plan
- to provide achievable financial plans for the immediate future
- to set benchmarks for anticipated financial performance
- to analyze successful and failed initiatives
- to negotiate with suppliers and service providers
- to communicate and monitor targets
- to manage stakeholder expectations

Knowledge of:

- a uniform system of accounts for hospitality
- budgeting and forecasting processes (e.g. revenue, expense)
- financial aspects of a business (e.g. asset, liability, equity, long- and short-term debt management)
- cash flow management
- profit and loss management
- ratio analysis and industry benchmarks

Ability to:

- analyze financial information (e.g. business plan, profit and loss reports)
- conduct a SWOT analysis (e.g. review priorities, potential problems and risks)
- delegate responsibility for the development of budgets
- draft a budget (e.g. devise operating, capital, sales and expenditure budgets)
- negotiate a draft budget

- finalize a budget
- create necessary budget statements
- amend a budget as required (e.g. forecasting, reforecasting)

*Relevance:* 4

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 12 months

### 14.2 operationalize budgets

*Why is this subskill important?*

- to comply with planned budget expenditures
- to monitor financial performance
- to anticipate, plan and control budget overruns and shortfalls
- to allocate resources responsibly
- to ensure profitability and company growth

Knowledge of:

- organizational policies, procedures and strategies (e.g. service standards)
- cost analyses (e.g. food, beverage, labour and other operating expenses)
- budget implementation (e.g. main causes of variances)
- contingency plans
- revenue management

Ability to:

- review daily reports to ensure that revenue and expenses are within guidelines
- make recommendations to ensure the achievement of budget goals in relevant areas
- use forecasts to project sales, operating costs and capital costs
- break down revenue and costs to daily, weekly or monthly budget plans
- analyze profit and loss statements

# C | MANAGING FINANCIAL RESOURCES

## 15: Manage financial transactions

- investigate the causes of significant variances (e.g. identify potentially fraudulent activities)
- apply a reforecasting method
- inform stakeholders on an ongoing basis of financial performance
- encourage employees to improve profitability (e.g. by offering employee incentives)
- complete all financial and statistical reports

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 13 months

## 15. Manage financial transactions

### 15.1 manage point-of-sale systems

*Why is this subskill important?*

- to ensure the efficiency, honesty, transparency and clarity of sales transactions
- to ensure accurate recording of transactions
- to maintain a history of transactions for reference
- to monitor sales, costs and productivity
- to track customer loyalty

*Knowledge of:*

- the requirements of one's organization (e.g. types of reports, hours of operation, menus)
- various types of point-of-sale systems (e.g. features, variability, availability of service, cost)
- the implementation of a point-of-sale computer system (e.g. security breaches, user rights)
- taxation and legislation relating to payment handling (e.g. policy and procedures on refunds)
- functions of point-of-sale computer systems (i.e. to balance off accounts, prepare reports, analyze data)

*Ability to:*

- select a point-of-sale system based on the requirements of one's organization
- set up a point-of-sale system
- set up payment transaction procedures
- ensure that data on discounts and promotions is up to date
- train and support employees in the use of a point-of-sale system
- implement a contingency plan to handle a point-of-sale system failure
- generate reports
- analyze data
- track sales
- monitor payment systems and procedures (e.g. bank procedures)
- reconcile sales transactions
- implement corrective actions to deal with breaches
- manage control points (e.g. safe, cash register, overages and shortages, voids, cash deposits, petty cash, payment methods, coupons, promotions, giveaways)

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 4 months

### 15.2 manage receivables and payables

*Why is this subskill important?*

- to ensure correct payment and accurate billing
- to manage cash flow
- to monitor debtors and creditors to eliminate late payments
- to manage supplier expectations
- to control expenses and supplies
- to adhere to budgets
- to monitor pricing and costs

- to comply with regulatory and tax requirements
- to maintain audit trails and a record of transactions

Knowledge of:

- credit and payables policies
- invoicing and payables procedures
- auditing methods (e.g. spot checks, discount authorizations)
- contracts (e.g. credit card agreements, bank contracts)

Ability to:

- implement a credit and payables policy
- maintain a general ledger
- create an aging report
- devise an invoicing and payables system
- improve invoicing practices on an ongoing basis
- audit systems
- evaluate contractual agreements
- optimize contractual agreements

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 7 months

## 16. Manage profit and loss

### 16.1 control expenses

*Why is this subskill important?*

- to maximize the profitability of one's organization
- to reduce undue negative influences on profit accumulation
- to ensure expenses do not exceed budgetary requirements
- to maintain prudent fiscal stewardship
- to monitor performance

Knowledge of:

- profit and loss statements (e.g. reports on labour productivity, food and beverage cost, cost recovery)
- inventory management (e.g. operating equipment, perishables, waste management)

Ability to:

- collect data (e.g. cost of sales, labour and other operating expenses)
- analyze expenses (e.g. food cost, labour cost, food cost ratio)



## C | MANAGING FINANCIAL RESOURCES

### 17: Manage payroll

- optimize profitability (e.g. productivity, control waste, menu engineering)
- control inventory (e.g. shelf life, rotation, expiry date)
- calculate the cost of goods sold and determine variances

*Relevance: 4*

*Criticality: 4*

*Frequency: 2*

*Mastery Time: 6 months*

#### 16.2 optimize revenues

*Why is this subskill important?*

- to enhance profitability
- to ensure that revenues are in line with budgets
- to determine whether a marketing strategy should be revised to achieve revenue goals
- to avoid chances of pilfering

Knowledge of:

- revenue management (e.g. sales promotions, yield)
- menu engineering (e.g. menu pricing and revision, contribution margin)
- market trends

Ability to:

- maintain accurate records of accounting practices, profit and loss statements, sales, costs and departmental profit
- collect data (e.g. point-of-sales reports)
- analyze sales (e.g. food, beverage, coverage ratio, catering)
- identify the most profitable products, services and other profit drivers of one's organization
- identify and control unexpected costs
- determine whether business plans and strategies require adjustment to achieve profit margins

- focus efforts on areas in need of improvement to achieve profit margins
- promote and monitor revenue generation (e.g. pricing strategy, employee incentives)
- apply a revenue management strategy
- determine the impact of market changes on the business
- develop a financial management system

*Relevance: 4*

*Criticality: 4*

*Frequency: 2*

*Mastery Time: 11 months*

## 17. Manage payroll

### 17.1 establish a payroll system

*Why is this subskill important?*

- to ensure timely and accurate payment
- to establish salary and wage schedules
- to establish pay scales and incremental raise policies
- to create a fair and equitable meritocracy policy
- to ensure individuals understand and accept the company's productivity expectations and personal profitability objectives
- to ensure correct withholdings and deductions
- to ensure employee satisfaction
- to maintain desired payroll costs
- to ensure profitability and company growth

Knowledge of:

- labour laws and compensation schemes (e.g. minimum wage, maximum hours)
- direct and indirect labour costs
- payroll processing documentation

- organizational and regulatory requirements (e.g. privacy of information)
- collective bargaining and long-term agreements

Ability to:

- select a suitable payroll system
- implement a payroll system (e.g. time card, overtime, shifts)
- monitor a payroll system (e.g. daily payroll report, edit reports)
- establish and communicate labour policy
- keep personal data confidential
- implement a contingency plan
- modify a payroll system as necessary

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 11 months



### 17.2 control payroll expenses

*Why is this subskill important?*

- to reduce unnecessary overtime
- to control the number of casual employees
- to ensure payroll expenses are in line with budgetary requirements
- to ensure staff productivity
- to ensure profitability and company growth

Knowledge of:

- staffing options (e.g. temporary, permanent, casual or agency staff, full-time or part-time)
- the direct and indirect costs of different staffing levels and options
- processing staff payroll documentation (e.g. time sheets, pay slips)
- the payroll cut-off dates of one's organization
- labour laws (e.g. overtime hours, vacation pay)

Ability to:

- check payroll data against records of actual hours worked
- assign the achievement of variable salary components (e.g. bonus, incentives)
- use staffing guideline policies (e.g. full-time equivalent, sales per hour)
- audit the payroll to obtain an accurate headcount and review of expenses
- review payroll costs against an allocated staffing budget
- balance the ratio of permanent, temporary and casual employees
- use digital tools and application software to facilitate payroll management

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 5 months



# D | MANAGING HUMAN RESOURCES



## 18. Manage staffing operations

### 18.1 devise an employee compensation and welfare system

*Why is this subskill important?*

- to maintain desired payroll costs
- to establish pay scales and incremental raise policies
- to ensure correct withholdings and deductions
- to establish salary and wage schedules
- to ensure timely and accurate payment
- to create a fair and equitable meritocracy policy
- to ensure individuals understand and accept the company's productivity expectations and personal profitability objectives
- to ensure employee satisfaction
- to ensure profitability and company growth

Knowledge of:

- legal requirements (e.g. pensions, insurance, overtime pay)
- market research methodologies (e.g. interviews, questionnaires, focus groups)
- human resource trends (e.g. labour shortages, incentives, benefits)

Ability to:

- evaluate the competitive environment (e.g. wage rates, fringe benefits)
- determine the staff compensation and welfare system one's organization needs
- establish criteria for a staff compensation and welfare system (e.g. objective, competitive, flexible, appealing)
- select a performance-based compensation system
- implement a staff compensation and welfare system



*Relevance:* 3  
*Criticality:* 3  
*Frequency:* 2  
*Mastery Time:* 12 months

## 18.2 hire employees

*Why is this subskill important?*

- to match staffing levels to business volume
- to promote the image of one's organization as a desirable employer
- to apply the diversity and equality policy of one's organization
- to attract and hire the most suitable candidate for a job

Knowledge of:

- recruitment strategies (e.g. social media, job fairs, recruitment agencies)
- the advantages and disadvantages of different recruitment and selection methods
- employee selection strategies (e.g. psychometric testing, skills matching)
- interview techniques (e.g. behavioural interviews, virtual interviews)
- applicable laws (e.g. anti-discrimination legislation, licensing requirements, disability)
- minimum eligibility and qualification requirements
- collective bargaining agreements, where applicable

Ability to:

- assess staffing needs (e.g. based on productivity ratios, service standards, business forecasts)
- review job analyses (e.g. occupational standard)
- determine staff qualification requirements (e.g. needed skills sets)
- develop and update job descriptions
- define job postings

- use various avenues to recruit employees (e.g. recruitment agencies, job boards, internships, apprenticeships)
- define selection criteria for employment
- document the outcome of a recruitment process (e.g. complete recruitment scorecards)
- select qualified job applicants
- identify appropriate interview techniques
- conduct employment interviews
- conduct reference checks (e.g. background check, social media, criminal records)
- evaluate potential employees
- select employees
- evaluate the recruitment and selection process

*Relevance:* 4  
*Criticality:* 4  
*Frequency:* 2  
*Mastery Time:* 6 months

## 18.3 facilitate employee orientation

*Why is this subskill important?*

- to familiarize new employees with standard operating procedures
- to ensure staff loyalty and brand equity
- to ensure a positive work environment
- to establish operational requirements and expected standards
- to define the quality standards for products or services provided

Knowledge of:

- corporate culture (e.g. vision, mission, values and goals, strategies)
- organizational structure (e.g. employee manual, house rules)
- policy resources (e.g. health and safety regulations)
- orientation methods and techniques (e.g. classroom, on the job)
- effective orientation strategies

# D | MANAGING HUMAN RESOURCES

## 19: Manage employee training and development

Ability to:

- identify orientation programs
- develop orientation programs
- conduct orientation training
- review and revise orientation training

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 6 months

### 18.4 develop an employee handbook

*Why is this subskill important?*

- to familiarize new employees with standard operating procedures
- to ensure staff loyalty and brand equity
- to establish operational requirements and expected standards
- to define the quality standards for products or services provided
- to relay the company's vision, mission, values, goals, commitment to employees, benefits, dress code, safety and security

Knowledge of:

- the purpose of policies and procedures
- brand standards, policies and procedures
- the format of policies and procedures
- areas that policies and procedures commonly address (e.g. service staff grooming and dress code, employee conduct, safety and security)
- the purpose and content of the employee handbook

Ability to:

- develop an employee handbook
- review an existing handbook
- seek input on handbook from employees and management team
- ensure that handbook content is comprehensive, engaging and up to date

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 8 months

## 19. Manage employee training and development

### 19.1 assess training needs

*Why is this subskill important?*

- to ensure productivity and adherence to budget guidelines
- to fulfill customer expectations
- to improve staff performance
- to address weaknesses and skill gaps
- to identify training required to gain a competitive advantage
- to improve the quality of products and services continually

Knowledge of:

- a national or regional qualification framework
- corporate and occupational standards
- training requirements (e.g. needs assessment, needs analysis)
- training resources available

Ability to:

- identify training needs (e.g. cross-training)
- identify the nature and cause of employee performance problems
- benchmark skills and task requirements at the job level
- track pre- and post-program results and outcomes

*Relevance:* 4

*Criticality:* 4

*Frequency:* 3

*Mastery Time:* 7 months

### 19.2 develop training programs

*Why is this subskill important?*

- to promote efficiency by keeping staff up to date on the latest developments
- to improve productivity and the quality of products and services
- to provide staff with tools and expertise to enhance customers' experiences
- to provide training plans that meet individual training needs
- to facilitate skills development



- to provide training suited to the needs of one's organization and employees
- to promote a training culture in one's organization
- to promote job satisfaction
- to reduce stress, absenteeism and staff turnover

Knowledge of:

- job and task analyses
- curriculum design processes
- the didactical approach (e.g. adult learning, continuing training)
- outsourced training solutions (e.g. safety program)

Ability to:

- identify short- and long-term training objectives and strategies
- weigh the costs and benefits to one's organization of proposed training
- design a training curriculum
- specify training content (e.g. competencies, skills, knowledge)
- keep an inventory of current training programs

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 11 months

### 19.3 deliver employee training

*Why is this subskill important?*

- to promote efficiency by keeping staff up to date on the latest developments
- to improve productivity and the quality of products and services
- to provide staff with tools and expertise to enhance customers' experiences
- to provide training suited to the needs of one's organization and employees

# D | MANAGING HUMAN RESOURCES

## 20: Organize schedules

Knowledge of:

- didactical and andragogy approaches (e.g. adult learning, continuing training)
- training methodologies (e.g. modelling skills, counselling)

Ability to:

- interpret a curriculum
- schedule training sessions
- create suitable training concepts (e.g. seminars, learn-and-work assignments)
- conduct training
- train trainers
- use the services of external training providers
- keep records of training completed (e.g. attendance signing sheets)

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 8 months

### 19.4 evaluate the effectiveness of training

*Why is this subskill important?*

- to ensure that expected results are achieved
- to ensure returns on training investments
- to assess training effectiveness

Knowledge of:

- evaluation methodologies
- cost-benefit analyses
- returns on training investment

Ability to:

- organize a training evaluation
- apply evaluation methods
- assess performance and productivity
- conduct a cost-benefit analysis of training
- review evaluation results and update training

*Relevance:* 4

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 4 months

## 20. Organize schedules

### 20.1 develop scheduling guidelines

*Why is this subskill important?*

- to maintain the consistency of service standards
- to ensure the smooth operation of one's organization
- to maintain the security of the premises
- to minimize labour costs

Knowledge of:

- relevant legislation, company policy and contract terms and conditions (e.g. for work hours, collective bargaining)
- staffing guidelines
- best practices and key performance indicators (KPI)

Ability to:

- identify human resource needs
- establish scheduling criteria (e.g. seniority, level of business)
- assess employee productivity (e.g. based on full-time equivalent)
- develop an appropriate (i.e. fair, impartial) scheduling system
- improve scheduling systems on an ongoing basis

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 4 months

### 20.2 schedule staff

*Why is this subskill important?*

- to maintain the consistency of service standards
- to ensure the smooth operation of one's organization
- to maintain the security of the premises



- to minimize labour costs
- to balance the needs of staff and one's organization

Knowledge of:

- staffing guidelines and shift patterns
- profit and loss statements
- contingency staffing plans (e.g. for unplanned situations, sickness)

Ability to:

- apply scheduling guidelines
- develop a schedule that takes into account the qualifications and competencies of team members
- accommodate the needs of employees in a scheduling process (e.g. leave plan)
- develop contingency staffing plans (e.g. for employee absence, sickness, vacations)
- use historical data and probability planning methods to manage costs

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 4 months

## 21. Manage employee performance

### 21.1 develop a performance management program

*Why is this subskill important?*

- to gauge staff performance against set goals
- to develop appropriate criteria for staff evaluation
- to develop separate evaluation criteria for supervisory and management staff
- to schedule regular and frequent performance reviews
- to schedule reviews for promotions and salary adjustments
- to monitor performance and determine ongoing training needs
- to ensure productivity and adherence to budget guidelines
- to fulfill guest expectations
- to ensure staff satisfaction

Knowledge of:

- corporate objectives
- occupational and corporate standards
- relevant legislation (e.g. for workplace harassment, equal opportunity)
- financial resources
- performance evaluation methods

# D | MANAGING HUMAN RESOURCES

## 21: Manage employee performance

Ability to:

- develop strategic performance-management goals
- set up measurable performance evaluation criteria
- select performance review methodologies
- consider the results of previous evaluation processes

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 12 months

- reinforce desired behaviours
- promote employee self-assessment
- guarantee an unbiased assessment
- benchmark performance (e.g. against standards, KPIs)
- determine appropriate measures based on evaluation results
- keep written records of all interventions

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 12 months

### 21.2 conduct performance reviews

*Why is this subskill important?*

- to gauge staff performance against set goals
- to monitor performance and determine ongoing training needs
- to ensure productivity and adherence to budget guidelines
- to fulfill customer expectations
- to determine staff reassignment and job redesign needs
- to make decisions regarding promotions and salary adjustments
- to ensure staff satisfaction

Knowledge of:

- performance management programs
- performance criteria
- human nature (e.g. personality traits, stereotyping)
- performance review policies and procedures
- productivity management (e.g. cost of labour compared to revenue)

Ability to:

- clarify performance expectations
- observe employees on the job
- provide feedback on behaviour

### 21.3 apply reward and disciplinary measures

*Why is this subskill important?*

- to maintain discipline and decorum
- to implement progressive warnings and disciplinary measures

Knowledge of:

- relevant legislation and regulations, legal implications and liabilities
- policies and procedures of one's organization
- terms of collective agreements
- conflict resolution methods (e.g. judicial procedure, arbitration, union representation, grievance resolution)
- types of reward and disciplinary measures
- the effectiveness and consequences of disciplinary measures
- advantages and disadvantages of various types of disciplinary measures
- termination and dismissal policies and procedures

Ability to:

- identify reward and disciplinary measures
- facilitate the timely conferral of rewards for effective performances

- implement fair and transparent disciplinary systems
- facilitate the timely application of disciplinary measures
- investigate performance and behaviour problems
- deal with drug and alcohol abuse
- take security measures when necessary
- justify decisions to dismiss or lay off employees
- document disciplinary actions

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 9 months

#### 21.4 manage grievances

*Why is this subskill important?*

- to investigate and resolve grievances
- to establish a policy that is impartial, fair and free from favouritism and collusion
- to prevent conflict through the facilitation of social dialogues

Knowledge of:

- relevant legislation, legal issues and implications
- legal frameworks that govern grievance resolution
- the formal grievance procedures of one's organization
- collective agreement provisions
- conflict management strategies
- the importance of third-party involvement in the resolution of grievances
- arbitration and mediation methods

Ability to:

- cooperate with union representatives and members

- establish consultative structures to identify and resolve grievances
- identify potential grievances
- investigate the nature of a grievance
- apply the formal grievance procedures of one's organization
- discuss grievances with employees and union representatives
- implement interventions as needed
- apply preventative measures to resolve issues and prevent grievances
- document grievance procedures
- maintain accurate records of all interventions

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 9 months

#### 21.5 manage an employee exit process

*Why is this subskill important?*

- to determine the causes of staff exits
- to foster a positive impression among departing staff
- to standardize exit procedures
- to minimize staff turnover and attrition

Knowledge of:

- labour law
- security implications
- paperwork and administrative procedures
- organizational and representational exit policies and procedures

Ability to:

- develop appropriate documentation protocol
- develop exit processing tools
- process resignation requests
- conduct exit interviews
- inquire about employee departures
- document reasons for a separation



# D | MANAGING HUMAN RESOURCES

## 22: Manage succession planning

- conduct out-processing activities
- complete paperwork
- use exit interview information constructively
- assess the causes and effects of high and low staff turnover
- implement strategies to reduce staff turnover and attrition
- enact and implement organizational changes, as warranted by exit interviews
- identify and mitigate potentially harmful terminations

*Relevance:* 3

*Criticality:* 3

*Frequency:* 1

*Mastery Time:* 5 months

## 22. Manage succession planning

### 22.1 implement a succession plan

*Why is this subskill important?*

- to ensure continuity in skills and methods of operation
- to secure a future talent supply
- to meet staffing needs expeditiously
- to identify and develop rising stars and outstanding performers
- to ensure the longevity of the business

Knowledge of:

- key staffing priorities
- the characteristics of succession plans
- the benefits of succession planning and development
- pitfalls in succession planning
- the structure of one's organization
- SWOT analyses (e.g. pitfalls, benefits)





- the objectives of Human Resources (HR) (long-term, short-term, immediate, planned) in one's organization
- succession planning analytics

Ability to:

- engage in strategic human resource planning and the development of organizational objectives
- remodel and re-conceptualize invalidated models
- identify potential talent and opportunistic promotions
- review current and emerging needs
- conduct capacity assessments
- articulate priorities clearly
- identify key and hard-to-replace positions
- identify key positions that require immediate filling
- identify employees who are likely to leave
- identify potential vacancies (e.g. terminations, resignations, evolution)

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 8 months

### 22.2 manage succession development

*Why is this subskill important?*

- to ensure continuity in skills and methods of operation
- to secure a future talent supply
- to meet staffing needs expeditiously
- to identify and develop rising stars and outstanding performers
- to ensure the longevity of one's business

Knowledge of:

- career paths and ladders
- staff development models and strategies
- mentoring's role and potential benefits

- talent management strategies
- succession planning approaches
- capacity and needs assessments
- personal development planning (PDP) best practices

Ability to:

- develop individual personal development plans
- develop a succession plan
- identify career paths
- customize career paths according to employees' abilities and talents
- identify employees who have potential to be promoted
- identify, hire and nominate candidates for advancement and development
- identify organizational needs and vacancies
- identify skills and knowledge that require development
- provide formal and informal training and development opportunities to key employees
- provide mentoring support and advice to key employees
- arrange for regular job rotations and job shadowing
- manage the career advancement of key employees
- develop metrics for measuring the outcomes of succession development
- monitor a talent management plan
- assess and revise a succession plan

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 11 months

# D | MANAGING HUMAN RESOURCES

## 23: Manage workplace climate

### 23. Manage workplace climate

#### 23.1 manage workplace diversity

*Why is this subskill important?*

- to implement policies that encourage workforce diversity
- to ensure that policies and procedures are fair and non-discriminatory
- to provide all personnel with a fair and balanced work environment
- to establish equal opportunity employer policies
- to hire, evaluate, reward and promote employees impartially
- to implement reasonable accommodation policies

Knowledge of:

- workplace diversity issues (e.g. legal issues, societal issues)
- the benefits of a diverse workforce
- visible and invisible differences among people
- inclusive practices
- strategies to accommodate the individual needs of employees and customers
- values and biases
- employment and human rights legislation
- the diversity policies of one's organization

Ability to:

- develop work practices that show respect for workplace diversity
- promote the benefits of productive diversity to colleagues
- use diversity as an asset
- encourage employees to respect the diversity of co-workers and customers

- identify obstacles to, and problems, critics and detractors of, diversity
- identify diversity-related training needs
- recognize workplace problems that may arise from diversity
- deal with problems that arise from diversity issues

*Relevance: 3*

*Criticality: 3*

*Frequency: 2*

*Mastery Time: 7 months*



### 23.2 maintain a positive workplace environment

*Why is this subskill important?*

- to promote pride in one's company and service excellence
- to enhance work efficiency and effectiveness
- to motivate staff and promote job satisfaction
- to ensure team members perform at their best
- to promote creativity and originality
- to nurture enthusiasm, optimism and a positive attitude
- to promote staff loyalty and trust

Knowledge of:

- industrial relations
- industrial relations systems in force
- the legal obligations of employers
- the role of relevant industry unions and employer groups
- awards provided to employees in relevant industry sectors
- workplace agreements
- industrial unrest
- workplace pressures and their causes
- barriers to a positive workplace environment
- conflict resolution
- grievance and industrial dispute resolution

Ability to:

- build and maintain a positive industrial relations climate
- contribute to the development of formal industrial relations procedures
- secure specialized assistance in industrial relations matters when appropriate
- create employment conditions that adhere to relevant legislation and collective bargaining agreements
- prepare clear and reasonable working guidelines
- achieve buy-in from all stakeholders
- implement mechanisms for consulting employees and facilitating two-way communication
- provide employees with accurate and impartial information on industrial matters that will likely affect staff
- identify and evaluate issues that may cause industrial unrest
- resolve employee relations issues promptly, using accepted procedures (i.e. according to the policy and legal requirements of one's organization)
- monitor accepted processes and adjust them, as appropriate, in consultation with relevant parties
- help employees deal with stressful situations

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 7 months

# E | MANAGING PHYSICAL RESOURCES

## 24. Plan food and beverage facilities

### 24.1 manage the set up of food and beverage facilities

*Why is this subskill important?*

- to optimize the use of space
- to ensure a logical workflow within an available space
- to ensure a work environment is conducive to productivity

Knowledge of:

- brand standards and industry best practices and trends
- legislation (e.g. accessibility for persons with disabilities, building codes)
- cost estimation
- budget development
- project management strategies
- criteria used to select the locations of food and beverage facilities
- facility planning
- design and layout of front- and back-of-house facilities (e.g. bars, restaurants, kitchens)
- permits and legal documents required to establish a business
- contingency planning
- long-term goals of one's organization
- asset and property management

Ability to:

- develop budgets
- assess and select appropriate locations for food and beverage service (front-of-the house) and preparation (back-of-the house) facilities
- determine restaurant and bar capacities
- anticipate future needs for facility expansion and development

- manage available space to maximize revenue potential
- estimate current and future capital needs
- participate in facility planning
- ensure that the designs and layouts of facilities are appropriate for the scale and volume of operations
- ensure that the designs and layouts of facilities maximize sustainability and the efficient use of labour and energy
- comply with legislation (e.g. noise control) and health and safety standards
- manage a tender process
- apply return-on-investment techniques to all projects

*Relevance: 4*

*Criticality: 3*

*Frequency: 2*

*Mastery Time: 19 months*

### 24.2 plan equipment needs for food and beverage facilities

*Why is this subskill important?*

- to optimize the use of space
- to ensure the quantity and quality of food and beverage production
- to ensure labour productivity

Knowledge of:

- brand standards and industry best practices and trends
- types of food and beverage equipment
- equipment capacities and limitations

Ability to:

- assess current and future equipment needs
- determine information technology requirements
- manage a tender process

- evaluate and select equipment (e.g. furnishings, service accessories, entertainment equipment) for food and beverage facilities
- manage capital expenditures

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 19 months

## 25. Manage food and beverage facilities and equipment

### 25.1 manage the maintenance of physical resources

*Why is this subskill important?*

- to ensure all facilities are in optimal condition
- to minimize deterioration
- to monitor and regulate depreciation costs
- to manage the replacement and repairs of facility resources
- to control facility maintenance costs
- to ensure compliance with all laws and regulations

Knowledge of:

- brand standards and industry best practices and trends
- health and safety regulations for food and beverage facilities
- preventive maintenance
- asset and property management
- contingency planning strategies

Ability to:

- develop short- and long-term preventive maintenance plans
- establish periodic and preventive facility maintenance schedules
- manage maintenance schedules
- ensure employee engagement in facility and equipment maintenance

- conduct scheduled facility inspections and audits
- apply asset management techniques (e.g. calculation of depreciation and replacement costs)
- carry out risk assessments of facilities and equipment
- perform feasibility studies and cost analyses of facility improvements
- manage renovations
- ensure the cooperation and collaboration of stakeholders in preventive and corrective maintenance
- ensure the compliance of facilities with all laws and regulations

*Relevance:* 3

*Criticality:* 2

*Frequency:* 2

*Mastery Time:* 9 months

### 25.2 manage the maintenance of operating equipment

*Why is this subskill important?*

- to ensure equipment is in optimal condition
- to monitor and regulate depreciation costs
- to manage the replacement and repairs of equipment
- to control equipment maintenance costs
- to ensure compliance with all laws and regulations

## E | MANAGING PHYSICAL RESOURCES

25: Manage food and beverage facilities and equipment

Knowledge of:

- equipment requirements of brand standards (e.g. china, glass, silver, linen)
- par-stock levels of one's organization
- equipment supply options
- operating equipment costs

Ability to:

- assess in-house and outsourcing options for maintaining and repairing equipment
- implement brand standards and industry best practices
- establish periodic and preventive equipment maintenance schedules

- manage the cost-effective purchasing of operating equipment
- implement procedures for issuing and receiving equipment
- manage storage facilities
- manage par-stock levels (e.g. for linen)
- plan and implement an operating equipment management system
- ensure the compliance of equipment with all laws and regulations

*Relevance: 4*

*Criticality: 3*

*Frequency: 2*

*Mastery Time: 7 months*



# F | MANAGING PROVISIONING OF SUPPLIES

## 26. Manage supply chains

### 26.1 select suppliers

*Why is this subskill important?*

- to ensure reliable and timely delivery of products and services
- to acquire products and services at competitive costs
- to uphold standards of quality

Knowledge of:

- purchasing policies
- tendering of food and beverage supplies, equipment, consumables and services
- criteria and best practices for evaluating tenders
- legal, regulatory and organizational requirements for food and beverage supplies

Ability to:

- identify supply acquisition requirements
- establish purchasing budgets
- survey the market to monitor purchasing prices
- research potential suppliers
- develop tenders
- promote invitations to tender
- evaluate tenders against established criteria
- compare prices and quality
- assess suppliers based on specifications
- select suppliers
- evaluate purchasing procedures
- conduct regular competitive surveys of suppliers

*Relevance:* 4

*Criticality:* 4

*Frequency:* 2

*Mastery Time:* 6 months

### 26.2 manage supplier contracts

*Why is this subskill important?*

- to uphold standards of quality
- to ensure the timely delivery of products and services
- to ensure compliance with terms of agreements
- to improve contract compliance
- to standardize a contract management process

Knowledge of:

- types of supplier contracts and agreements
- methods of monitoring compliance with a contract
- contract management policies of one's organization

Ability to:

- negotiate contracts that maximize potential for profit
- build productive and harmonious relationships with suppliers
- ensure effective and sustainable procurement
- order from local suppliers to reduce food mileage
- establish service level agreements
- monitor compliance with contracts
- monitor the performance of suppliers
- deal effectively with supplier disputes
- renegotiate contract terms
- evaluate the success or failure of contractual arrangements

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 8 months

# F | MANAGING PROVISIONING OF SUPPLIES

## 27: Manage stock

### 27.1 Manage stock

#### 27.1 order stock

*Why is this subskill important?*

- to ensure adequate supplies of stock
- to uphold standards of quality
- to ensure the timely delivery of products and services

Knowledge of:

- purchasing policies
- purchasing procedures
- quality assurance
- sources of locally grown produce and supplies

Ability to:

- determine stock level requirements
- estimate supply requirements
- create product lists
- establish economic order quantities
- develop appropriate and accurate purchase specifications
- compare prices and quality
- choose a supplier
- develop an order for stock
- place an order to meet timely delivery
- review product specifications regularly
- maintain a database of suppliers
- monitor the performance of suppliers
- evaluate the quality of supply and delivery processes

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 3 months

#### 27.2 control inventory

*Why is this subskill important?*

- to secure and keep track of all inventoried stocks
- to ensure a proper stock level
- to ensure a proper rotation of stock
- to minimize waste

Knowledge of:

- the inventory control system and best practices of one's organization
- food and beverage storage
- par-stock requirements
- stock control (e.g. food and beverage equipment)
- stock rotation
- quality standards
- receiving procedures

Ability to:

- determine par-stock and production levels based on historical data, delivery cycles and storage space
- schedule and coordinate the delivery of supplies
- develop a receiving procedure for checking deliveries against invoices, rejecting unacceptable products, reporting irregularities and managing substitutions
- develop, establish and implement a procedure for organizing, storing, securing, maintaining, rotating and updating inventory as required
- supervise food storage operations
- supervise cellar and drink storage operations
- review slow-moving and non-moving supplies
- develop guidelines for internal requisitions
- evaluate internal and external purchasing procedures and revise as appropriate
- ensure adherence to internal and external receiving procedures

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 4 months



# G | MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS

## 28. Plan food and beverage production and service

### 28.1 develop an operational plan

*Why is this subskill important?*

- to ensure efficient and effective staff performance
- to ensure high product quality and service excellence
- to ensure profitability

Knowledge of:

- back-of-house operations
- front-of-house operations
- project management
- resource utilization (e.g. labour, facilities, materials)
- current internal and external environments that impact operations
- legal issues that affect operations
- industry benchmarks, best practices and balanced scorecards
- the relationships among resources, productivity and levels of service
- service standards (e.g. service availability, reliability, flexibility)

Ability to:

- develop plans that meet strategic objectives
- identify specific implementation and monitoring issues that may affect plans
- apply an integrated system approach to planning
- develop and implement a back-of-house operations plan
- develop and implement a front-of-house operations plan
- identify resources necessary to implement plans

- manage trade-offs between productivity and levels of service
- administer and monitor operational plans
- conduct ongoing evaluations of operational plans

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 12 months

### 28.2 integrate digital technology systems

*Why is this subskill important?*

- to reduce operating costs
- to improve services
- to improve productivity
- to enhance accuracy
- to minimize redundancy and tedium

Knowledge of:

- computers and other digital tools
- specialized application software (e.g. security filing systems, antivirus, point-of-sale, social media)

Ability to:

- assess the digital technology needs of one's organization
- purchase hardware and software to meet organizational requirements
- facilitate the implementation and update of digital technology for food production and service
- use digital technology and appropriate software applications to facilitate management tasks
- ensure a comprehensive interface and minimal human intervention in data reportages and transfers

# G | MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS

## 28: Plan food and beverage production and service

- apply security measures in digital environments
- protect data, hardware and software applications
- determine factors that are key to using computer systems productively and efficiently
- consult information sources to obtain advice on computer systems
- manage the maintenance of computer equipment and systems

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 10 months

### 28.3 engineer recipes and menus

*Why is this subskill important?*

- to reduce waste and minimize inventory
- to ensure profitability, improve operating ratios and achieve maximum yield
- to ensure brand delivery
- to maintain product consistency
- to control costs
- to adjust an existing menu (e.g. by adding items, changing portion sizes or product in standard recipes)
- to avoid liability (e.g. allergic reactions)

Knowledge of:

- brand standards for the cost and style of new dishes and recipes
- the preferences of one's organization regarding new menu items
- health and safety standards
- healthy eating guidelines
- food for special needs (e.g. accommodations for persons with nut allergies, gluten intolerance, religious dietary restrictions)
- the components of a balanced diet
- food trends
- customer demands



- competitors' menu offerings
- the sales mix
- market opportunities (e.g. portion size)
- menu design
- food costing
- engineering benchmarks, best practices and balanced scorecards
- testing and assessment methods for recipes and menus

Ability to:

- analyze and evaluate market trends in food and beverage production
- perform a competitor analysis
- identify sources of information on new recipes, ingredients and special needs

- develop new recipes and menus based on market analysis
- create innovative dishes that use a range of produce
- establish food presentation and portion size guidelines for recipes
- design and implement a strategy for recipe and menu tasting
- test new recipes and menus
- monitor the progress of dish and recipe development
- follow and adapt recipes that are suitable to the organization's brand
- monitor customer preferences
- analyze the nutritional content of recipes and dishes
- establish ingredient ratios, cooking times and temperatures for recipes
- monitor the profitability of menu items
- keep accurate records and costing sheets on ingredients that new recipes require
- modify and update recipes and menus
- control waste to maximize profitability

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 9 months

#### 28.4 manage food presentation

*Why is this subskill important?*

- to specify plating standards
- to ensure that food is both visually appealing and practical to eat and serve
- to maintain customer satisfaction and quality standards

Knowledge of:

- the importance of food presentation (e.g. traditional and creative plating)
- brand standards

Ability to:

- ensure the availability of equipment to achieve required presentation
- research and develop presentation style
- inspect the presentation style before food is served to a customer
- document the presentation and portioning of food to promote standardization and consistency

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 10 months

#### 28.5 manage food portion sizes

*Why is this subskill important?*

- to establish standards for portion sizes
- to ensure customers' satisfaction with portion size
- to ensure profitability

Knowledge of:

- industry benchmarks and standards for portion size
- brand standards for portion control
- the effects of waste and inefficiency on profit margins

Ability to:

- determine portion sizes to reduce waste and increase profit
- ensure availability of the tools and equipment needed to calculate and serve correct portion sizes
- communicate brand standards for portion size to employees
- ensure that portion sizes fulfill the marketing and promotional messages of one's organizational brand

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 6 months

# G | MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS

28: Plan food and beverage production and service



## 28.6 develop a beverage program

*Why is this subskill important?*

- to present products in a way that appeals to customers
- to develop beverage recipes and pricing
- to comply with legal requirements
- to maintain customer satisfaction and quality standards

Knowledge of:

- beverage classification (e.g. spirits, soft drinks, wine, beer, mineral waters, coffee, tea)
- beverage mixology
- traditional and creative presentation
- beverage tasting, serving and food pairing
- types of cocktails
- storage
- legal requirements for beverage service

Ability to:

- analyze domestic and international market trends
- perform a competitor analysis
- research and develop a presentation style
- taste, assess and select beverages
- develop a beverage list and engineer a menu
- review and update a beverage list
- develop beverage recipes (e.g. cocktails, specialty drinks)
- develop beverage pricing
- implement beverage pairing procedures

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 8 months

**28.7 maintain organizational records**

*Why is this subskill important?*

- to facilitate audits by keeping a database and document trail
- to comply with applicable regulations
- to facilitate decision making and planning
- to ensure all data is up to date

Knowledge of:

- types of records (e.g. payroll, personnel, maintenance, security, incident reports, inventory, sales)
- records required by law
- privacy laws
- records required by collective agreements
- recordkeeping policies, procedures and methods

Ability to:

- maintain organizational records (e.g. profit and loss statements, productivity reports, food cost reports, beverage control reports, utilization reports, special reports, minutes of weekly departmental meetings, tests, recipes, staffing decisions)
- prepare, write and present reports
- ensure information is current and accurate
- organize and maintain records
- keep records with confidential information in a secure location
- determine which documents to archive and which to discard

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 5 months

**29. Manage service delivery**

**29.1 manage a shift**

*Why is this subskill important?*

- to ensure adherence to duty rosters and starting times
- to ensure the timely completion of mise en place and other preparations
- to optimize workforce deployment
- to accommodate the special needs of staff
- to control overtime, balance workloads, prevent burnout and reduce employee turnover
- to develop employee versatility and multi-tasking skills
- to distribute costs to places where productivity gains may be achieved
- to ensure brand consistency
- to ensure that all standards of operation and quality meet customer needs

Knowledge of:

- brand standards
- scheduling policies and procedures
- the terms of collective agreements, if applicable
- labour legislation, employment standards and occupational health and safety guidelines
- labour budgets
- time management practices

Ability to:

- monitor operations to ensure compliance with policies and applicable legislation
- ensure adequate staff levels
- deliver on brand standards
- ensure clean surroundings and a comfortable atmosphere
- ensure proper cash handling

# G | MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS

## 30: Manage food and beverage production

- respond to employee and customer needs
- accommodate special requests
- use a logbook to report shift activities to subsequent shifts
- manage shift handovers

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 3 months

### 29.2 manage opening and closing operations

*Why is this subskill important?*

- to establish opening and closing standards
- to ensure that all stations are equipped and staffed adequately
- to control customers' first impressions of brand concepts, and products and services provided
- to ensure employees handle cash according to security procedures

Knowledge of:

- brand standards
- opening and closing duties of employees
- time management practices

Ability to:

- manage operational checklists (e.g. staff briefings, daily food and beverage specials, grooming standards, service excellence)
- ensure that previous shifts complete their opening and closing activities in line with brand standards
- ensure that staff complete their opening and closing duties
- ensure coordination between the front- and back-of-house operations
- ensure customer and employee safety

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 5 months

## 30. Manage food and beverage production

### 30.1 monitor food and beverage preparation

*Why is this subskill important?*

- to ensure compliance with health, safety, sanitation and hygiene standards
- to control the quality and quantity of products and services provided
- to minimize waste
- to maximize profitability





Knowledge of:

- health and safety legislation
- brand standards
- food production techniques and procedures
- resource allocation
- employee skills and strengths, and ways to utilize them effectively
- employee training and development needs
- time management practices

Ability to:

- estimate the resources that food production operations need
- devise a plan to maximize the use of resources
- delegate work roles and responsibilities for food production
- coordinate food production activities
- inspect and update food production operations regularly
- implement objective work plans in collaboration with teams and individuals
- ensure that the stages of food production comply with relevant legislation and organizational policies
- monitor the presentation and quality of food
- ensure the consistency of food presentation and quality
- ensure effective communication between front- and back-of-house operations
- monitor costs, production yield and portion control to ensure the achievement of budgetary targets
- manage problems that may affect food production or standards of food service

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 7 months

### 30.2 maintain standards for food and beverage production operations

*Why is this subskill important?*

- to ensure compliance with health, safety, sanitation and hygiene standards
- to control the quality and quantity of products and services provided
- to minimize waste
- to maximize profitability

Knowledge of:

- brand standards and levels of service
- industry best practices, standards and levels of service
- quality management principles and concepts
- standard operating procedures (e.g. suggestive selling, up-selling, cross-selling)

Ability to:

- implement quality control techniques and standards in the production process
- implement and ensure adherence to quality control plans
- ensure the consistent preparation of food and beverages in accordance with brand standards
- create a working environment that motivates and inspires team members
- intervene when a disruption threatens planned food and beverage service operations
- develop a contingency plan for equipment failures
- maintain and enhance the quality of operations and products
- schedule and conduct work-in-process and quality control inspections
- identify and resolve quality control deficiencies
- complete quality control reports

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 8 months

# G | MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS

31: Manage food and beverage service operations

## 31. Manage food and beverage service operations

### 31.1 monitor food and beverage service operations

*Why is this subskill important?*

- to ensure compliance with health, safety, sanitation and hygiene standards
- to control the quality and quantity of products and services provided
- to ensure customers' satisfaction
- to ensure the quality of service meets brand standards

Knowledge of:

- health and safety regulations
- food and beverage legislation

- food and beverage service techniques and procedures
- traditional and brand service standards
- available resources
- employee skills and strengths, and ways to utilize them effectively
- employee training and development needs
- time management practices

Ability to:

- estimate the resources that food and beverage service operations need
- devise a plan to maximize the use of resources
- determine efficient and effective work-allocation arrangements in collaboration with employees
- allocate resources





- implement objective work plans in collaboration with teams and individuals
- delegate work roles and responsibilities for food service
- solve problems
- plan and monitor the adherence of food service to brand standards
- plan and monitor sustainable food service
- monitor and update food and beverage services regularly
- monitor the sequence and timing of food and beverage services
- develop procedures for clearing, cleaning and stocking food and beverage service areas
- ensure proper adherence to procedures for clearing, cleaning and stocking service areas
- monitor employee conduct and communication with customers
- ensure that food and beverage services meet and exceed customer expectations
- provide performance feedback to food service staff
- perform a competitive analysis of food and beverage service trends

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 7 months

### 31.2 maintain standards for food and beverage service operations

*Why is this subskill important?*

- to ensure a consistent quality of services
- to ensure customers' satisfaction and service excellence
- to ensure compliance with all applicable standards, laws and regulations

Knowledge of:

- brand standards and industry best practices and trends for achieving optimal customer meal experiences
- key food and beverage preparation features that contribute to desirable meal experiences
- key food and beverage service features that contribute to desirable meal experiences
- the impact of ambient factors (e.g. room décor, floral scents and bouquets, sound, music, lighting, heating) on the customer experience
- quality management principles and concepts
- techniques and standards of quality control in the service sequences process
- standard operating procedures
- quality measurement techniques
- problem solving practices
- service recovery strategies

Ability to:

- ensure the consistent service of food and beverages in accordance with brand standards
- ensure that all food and beverage services comply with relevant legislative and regulatory requirements
- manage staff scheduling to accommodate variation in demand
- create a working environment that motivates and inspires one's service team
- manage ambient factors (e.g. background music, lighting, décor)
- ensure service readiness (e.g. manage operational checklists)
- ensure the compliance of equipment and processes with operational specifications
- intervene when a disruption threatens planned food and beverage service operations
- develop a contingency plan for equipment failures

# G | MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS

## 32: Manage Events

- distinguish between standards of service and levels of service
- maintain and enhance the quality of service
- deal with any service problems or deviations from recognized brand and quality standards
- apply service recovery strategies
- apply quality assurance measures
- ensure the completion of actions to implement quality improvement recommendations
- complete quality control reports
- perform competitive analyses of food and beverage service trends

*Relevance: 4*

*Criticality: 4*

*Frequency: 2*

*Mastery Time: 8 months*

## 32. Manage Events

### 32.1 plan events

*Why is this subskill important?*

- to assess customers' needs
- to determine facility requirements
- to determine food and beverage requirements
- to determine staffing requirements
- to assess safety and security needs

Knowledge of:

- planning strategies for various events (e.g. conventions, banquets, special events, conferences, outside catering, weddings)
- food safety
- food and beverage preparation and service delivery methods for conventions, banquets and special events
- facility assessment (e.g. capacity management, accessibility, lighting, music, décor)
- strategies for managing functions

Ability to:

- determine customer requirements for various events
- identify relevant health and safety, licensing and other legal requirements
- plan procedures to ensure the fulfillment of requirements
- determine facility, staffing, equipment and food and beverage needs
- accommodate the special needs of niche markets (e.g. religious groups, children, the elderly, people with disabilities)
- conduct a cost analysis
- formulate a quotation
- manage the preparation and delivery of food and beverage service
- practise risk management
- design banquet menus for events
- coordinate services for events
- perform a competitive analysis of food and beverage service trends

*Relevance: 3*

*Criticality: 3*

*Frequency: 2*

*Mastery Time: 7 months*

### 32.2 monitor events

*Why is this subskill important?*

- to ensure a consistent quality of services
- to ensure customers' satisfaction and service excellence
- to ensure compliance with all applicable health, safety and security standards

Knowledge of:

- strategies for managing events
- coordination of food production
- coordination of food service and beverage provision

Ability to:

- link a range of ancillary services
- arrange simultaneous service delivery for a variety of events
- monitor the sequence and timing of food and beverage service
- apply quality assurance measures
- perform a competitive analysis of food and beverage service trends

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 6 months

- ensure a safe working environment
- ensure compliance with safety practices
- design and apply procedures for ware washing (e.g. different washing procedures for china, glass, silver)
- design and apply procedures for minimizing breakages and loss
- develop and apply cleaning and maintenance schedules for front- and back-of-house operations
- manage interdepartmental communications
- develop a contingency plan and procedures
- perform daily checks of cleanliness
- ensure the safe use of chemicals
- manage waste disposal
- manage recycling practices
- manage customer facilities and the cleaning of public areas
- monitor the effectiveness of employee performance
- apply quality assurance measures

*Relevance:* 2

*Criticality:* 2

*Frequency:* 2

*Mastery Time:* 3 months

## 33. Manage front- and back-of-house cleaning and sanitation

### 33.1 monitor housekeeping procedures

*Why is this subskill important?*

- to uphold the sanitation standards of all operations
- to protect the health of customers and employees
- to ensure compliance with all applicable health, safety and security standards

Knowledge of:

- front- and back-of-house maintenance practices
- organizational and regulatory maintenance requirements
- health and safety legislation
- maintenance practices and procedures

Ability to:

- ensure that front- and back-of-house teams are trained
- review the activities required by legislation and regulations regularly with employees

### 33.2 oversee uniform service and upkeep

*Why is this subskill important?*

- to maintain a professional image and uphold brand standards
- to meet guidelines for staff uniforms
- to ensure an adequate supply of uniforms

Knowledge of:

- brand standards
- industry best practices

Ability to:

- plan and implement a uniform-management system
- select a uniform that reflects the brand and culture of one's organization

## G | MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS

### 33: Manage front- and back-of-house cleaning and sanitation

- ensure that supplied uniforms meet organizational guidelines
- ensure that staff comply with organizational policies for uniforms and clothing
- manage the ordering of staff uniforms
- manage the supply of uniforms and other work wear
- provide space for the storage of uniforms and other work wear
- determine the par-stock levels and delivery turnaround times required to meet staff demand for uniforms
- establish acceptable par-stock levels and laundry turnaround times for staff uniforms
- develop contingency plans to deal with unusual levels of demand for uniforms
- oversee the maintenance of uniforms
- manage the laundering of employee uniforms
- develop guidelines for the replacement of staff uniforms
- add a budget process for yearly uniform replacements or style changes

*Relevance:* 2

*Criticality:* 2

*Frequency:* 2

*Mastery Time:* 3 months



# H | MANAGING CUSTOMER SERVICE

## 34. Manage customer reception

### 34.1 manage customer reservations

*Why is this subskill important?*

- to maximize seating and capacity
- to facilitate table allocation
- to ensure the correct recording of bookings

Knowledge of:

- reservation systems
- reservation policies
- different sources of advanced and ad-hoc reservations
- legal requirements for the protection of personal data
- brand standards and industry best practices and trends
- various digital tools and application software for reservations (for in-house and operating systems)

Ability to:

- plan and implement a customer reservation system (e.g. pre- and post-customer experience)
- review customer reservation systems
- implement the use of digital tools and application software for reservations
- ensure the compliance of reservation and booking services with relevant legislation
- accommodate special needs (e.g. allergies, wheelchair access)
- ensure customer that employees apply and update customer information

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 3 months

### 34.2 manage the customer experience

*Why is this subskill important?*

- to enhance customer satisfaction with respect to ambient factors and the quality of product and services
- to create a holistic customer experience rather than a simple gustatory event
- to deliver on brand promises and uphold brand standards of product and service quality
- to promote service excellence as a key competitive differentiator
- to ensure customer loyalty

Knowledge of:

- brand standards and industry best practices and trends
- service recovery
- key features of the customer experience
- the impact of ambient factors (e.g. room décor, floral scents and bouquets, sound, music, lighting, heating) on the customer experience
- quality management principles and concepts
- techniques and standards for quality control in the service sequences process
- standard operating procedures
- problem solving practices
- quality measurement techniques

Ability to:

- establish procedures for attending to customers with special needs
- implement procedures for handling customer property
- manage ambient factors (e.g. background music, lighting, décor)
- manage the appearance of front-of-house areas

# H | MANAGING CUSTOMER SERVICE

## 35: Manage customer loyalty

- evaluate the customer experience
- ensure employee engagement through standards
- manage menus and brand collateral

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 9 months

### 34.3 manage customer arrivals and departures

*Why is this subskill important?*

- to eliminate waiting times and ensure prompt services
- to optimize customers' arrival and departure experiences

Knowledge of:

- front-of-house standards
- front-of-house policies
- customer arrival and departure policies
- methods of maximizing customers' arrival and departure experiences
- effective communication

Ability to:

- establish customer arrival and departure procedures
- establish procedures for attending to customers with special needs
- communicate front-of-house standards to staff
- implement policies and procedures for front-of-house support
- implement procedures for handling customers' property
- ensure that customers (including those with special needs) have safe access to the building
- monitor the appearance of front-of-house areas

- ensure that the upkeep of reception and public areas complies with appropriate standards
- keep front-of-house signage and directions up to date
- monitor customers' arrival and departure experiences
- provide secure areas for the storage of customers' property
- ensure that security systems are in place and operate effectively
- display menus in appropriate locations

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 4 months

## 35. Manage customer loyalty

### 35.1 promote service excellence

*Why is this subskill important?*

- to enhance customer satisfaction by focusing on the performance of one's brand with respect to ambient factors and the quality of products and services
- to promote service excellence as a key competitive differentiator
- to deliver on brand promises
- to ensure a holistic customer experience
- to ensure customer loyalty
- to drive operational excellence

Knowledge of:

- service excellence
- standards of service excellence

Ability to:

- determine, clarify and anticipate customer preferences, needs and expectations throughout the service experience
- establish standards of service that are clear, simple, achievable and measurable

- ensure that staff understand the consequences of not abiding by standards
- ensure that staff are properly trained in service excellence
- train and encourage staff to anticipate customers' expectations and needs
- establish a system to recognize, reinforce and reward exemplary service performance
- create an environment that encourages staff improvement and achievement
- provide a clean and welcoming environment that makes customers feel at home
- offer accurate information about products and services to customers
- ensure the appropriate pacing of food-to-table delivery
- ensure prompt, courteous, good-mannered and enthusiastic service delivery (e.g. while greeting guests and bussing tables)
- ensure that food is served at the right temperature
- ensure that staff are able to get customers' orders right the first time
- establish a system that recognizes repeat customers
- implement a quality of service that promotes up-selling and cross-selling
- identify and resolve problems with products and services swiftly
- review the quality of customer service on an ongoing basis
- benchmark service excellence against that of competitors regularly

*Relevance:* 4

*Criticality:* 4

*Frequency:* 2

*Mastery Time:* 13 months



### 35.2 capture customer feedback

*Why is this subskill important?*

- to track and resolve customer concerns and complaints
- to maintain brand consistency and promote customer loyalty
- to facilitate the management of customer relationships
- to harness, analyze and use customer data for making strategic decisions



# H | MANAGING CUSTOMER SERVICE

## 35: Manage customer loyalty

Knowledge of:

- current legislation and ethical considerations regarding customer information
- brand standards and industry best practices
- quality management principles and concepts
- formal and informal feedback-collection methods
- the nature of customer feedback (i.e. negative or positive)
- qualitative and quantitative customer feedback

Ability to:

- identify customer interaction touch-points (e.g. meet, greet and seat; waiter interaction)
- plan and implement clear, simple, achievable and measurable systems to obtain information on customer needs, expectations and satisfaction levels
- ensure confidentiality when collecting feedback
- select and apply various feedback collection methods (e.g. mystery shoppers, surveys)
- ensure proper recording of customer feedback
- capture customer feedback from reviews, blogs and other social media networks
- analyze customer feedback
- benchmark feedback against that of competitors
- review feedback against brand standards
- manage feedback to enhance the customer experience

*Relevance:* 4

*Criticality:* 4

*Frequency:* 2

*Mastery Time:* 5 months

### 35.3 manage customer information

*Why is this subskill important?*

- to ensure proper recording of customer feedback
- to track and resolve customer concerns and complaints
- to maintain brand consistency
- to promote customer loyalty
- to develop a robust customer loyalty program
- to ensure that customer recognition practices are in place and deliver expected results

Knowledge of:

- current legislation and ethical considerations for collecting, retaining and sharing customer information
- policies and procedures for collecting and handling customer information
- security risks and threats to customer information and profiles
- customer loyalty strategies
- brand standards and industry best practices for customer service

Ability to:

- plan and implement procedures and systems to collect, capture and maintain customer records and profiles securely
- manage the protection of customer data
- segment the existing customer base
- manage customer profile information to deliver and enhance the customer experience
- apply customer information to promotional marketing activities
- assess and review customer loyalty strategies (e.g. balance scorecards)

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 5 months

### 35.4 manage service recovery

*Why is this subskill important?*

- to encourage customers to report issues and concerns
- to improve service delivery and customer satisfaction
- to address customer issues and concerns promptly

Knowledge of:

- brand standards and industry best practices for service recovery
- behavioural indicators of customer satisfaction and dissatisfaction (e.g. body language, factoring in cultural differences)
- service recovery strategies

Ability to:

- promote ownership of service recovery
- implement a strategy to collect and analyze customer complaints systematically
- collect information on the nature and implications of complaints
- implement a strategy for dealing with customer issues and concerns
- take responsibility for finding solutions to complaints
- apply a range of service recovery strategies
- use service recovery data to enhance the customer experience and build loyalty
- devise and implement solutions that balance customer expectations and organizational objectives

*Relevance:* 4

*Criticality:* 4

*Frequency:* 2

*Mastery Time:* 7 months

### 35.5 manage customer security

*Why is this subskill important?*

- to ensure compliance with all applicable laws and regulations
- to provide a secure environment for customers

Knowledge of:

- the ways in which ambient factors affect customers' sense of security
- health, safety and sanitation issues
- brand standards and industry best practices
- safety and security strategies
- local support services (e.g. police, fire department, ambulance)
- safety and security legislation

Ability to:

- plan and implement safety and security strategies
- engage employees in customer security strategies
- manage relations with local support services
- ensure that security systems are in place and operate effectively
- review customer security and privacy measures regularly

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 6 months

# MANAGING COMPLIANCE WITH LAWS AND REGULATIONS

## 36. Manage food and beverage safety and compliance programs

### 36.1 manage physical risk

*Why is this subskill important?*

- to provide a safe and secure workplace for all employees
- to provide a secure and safe environment for customers
- to minimize threats and eliminate risks
- to prepare for emergencies
- to ensure effective responses to emergencies

Knowledge of:

- brand standards and industry best practices
- occupational health and safety standards
- legislation (e.g. health and safety, environmental, other applicable laws and regulations)
- hazard analyses
- task safety analyses
- the relationships among hazards, exposure and risk
- risk assessment strategies
- strategies for eliminating or minimizing risks
- personal protective equipment



# MANAGING COMPLIANCE WITH LAWS AND REGULATIONS

## 36: Manage food and beverage safety and compliance programs

### Ability to:

- plan and implement risk assessment strategies
- assess the compliance of company health and safety systems with applicable laws and regulations
- act on incidents of non-compliance
- establish and maintain procedures for identifying, assessing, eliminating and controlling hazards and risks
- establish procedures for keeping records of identified hazards
- engage employees in risk management strategies
- coordinate any scheduled hazard identification activities
- use appropriate methods to identify actual or foreseeable hazards
- assess the safety risk associated with a hazard (e.g. rate risks of injury)
- review the risk assessment process
- apply administrative decisions to eliminate or control risk
- conduct job hazard analyses and assessments
- restructure job tasks to eliminate risk
- organize food preparation and service operations to reduce risks and hazards
- identify emergency exits
- determine personal protective equipment requirements
- ensure the serviceability of personal protective equipment
- conduct accident investigations and analyses
- record and report accidents
- make first aid arrangements
- maintain documentation relating to risk management

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 5 months

### 36.2 manage compliance with applicable laws and regulations

#### *Why is this subskill important?*

- to ensure compliance with all applicable laws and regulations
- to operate a safe, healthy and secure environment for employees and customers
- to prevent conditions or situations that could lead to liability

#### Knowledge of:

- brand standards and industry best practices
- applicable laws and regulations (e.g. health and safety, environmental, liquor licensing)
- criteria for compliance

#### Ability to:

- comply with applicable laws and regulations
- implement a food and beverage safety management system
- promote the responsible service of alcohol
- control hazards in food and beverage facilities
- implement a compliance strategy
- evaluate compliance strategies
- review compliance reports and act on incidents of non-compliance

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 7 months

## MANAGING COMPLIANCE WITH LAWS AND REGULATIONS

### 36: Manage food and beverage safety and compliance programs



#### 36.3 implement a food and beverage safety management system

*Why is this subskill important?*

- to ensure that premises and facilities are safe for both customers and staff
- to minimize threats and eliminate risks
- to ensure that all operations and practices conform to health and safety standards
- to comply with all applicable legislations and regulations

Knowledge of:

- current legislative and compliance requirements, and the penalties and dangers of non-compliance
- due diligence processes
- the responsibilities and obligations of one's organization for food safety management
- the consequences of cross-contamination
- hygiene practices
- sanitation guidelines

Ability to:

- analyze the legislative requirements for food safety to ensure compliance
- design the layout, use and maintenance of areas that can affect food safety
- establish protocols for hygiene, sanitation and food safety
- implement safety management systems
- implement measures to eliminate cross-contamination
- analyze the risks a variety of hazards pose to food safety
- identify food safety hazards
- exercise control over food safety
- establish food safety management procedures
- evaluate food safety procedures
- establish a recordkeeping policy and procedure for ease of information retrieval
- determine records that need to be kept and monitored regularly
- designate responsibilities for specific aspects of food safety
- identify effective methods for cleaning equipment and surfaces

## MANAGING COMPLIANCE WITH LAWS AND REGULATIONS

37: Manage workplace health and safety

- apply sanitation guidelines
- establish food and beverage storage guidelines
- identify the temperature levels and controls for various types of food
- establish guidelines for the shelf-life of perishable food and beverages

*Relevance:* 3

*Criticality:* 3

*Frequency:* 3

*Mastery Time:* 7 months

### 36.4 promote the responsible service of alcohol

*Why is this subskill important?*

- to comply with all applicable legislations and regulations
- to ensure the safety and well-being of customers

Knowledge of:

- legislation governing the sale and service of alcoholic beverages
- licensing requirements
- the principles of responsible alcohol service
- the effects of alcohol on human behaviour and performance

Ability to:

- implement policies for selling and serving alcohol according to the provisions of applicable legislation
- provide a range of non-alcoholic beverages
- promote responsible drinking
- implement policies for obtaining acceptable proof of age prior to the sale or service of alcoholic beverages
- train employees to recognize early signs of possible intoxication and take action
- implement policies and practices for dealing with intoxicated customers
- implement policies for refusing to serve alcohol to intoxicated customers
- implement policies for providing appropriate assistance to intoxicated customers

- train employees to use appropriate communication and conflict resolution skills to handle difficult situations
- identify and resolve situations that pose a threat to the safety or security of colleagues, customers or property promptly

*Relevance:* 4

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 3 months

## 37. Manage workplace health and safety

### 37.1 manage compliance with workplace health and safety regulations

*Why is this subskill important?*

- to comply with all applicable legislations and regulations
- to ensure the safety and well-being of employees

Knowledge of:

- applicable occupational health and safety regulations
- strategies to monitor, assess and ensure compliance with occupational health and safety regulations

Ability to:

- plan and implement a health and safety strategy
- keep up to date on legislative changes
- assess and monitor health and safety strategies
- act on incidents of non-compliance with health and safety regulations and practices

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 5 months

## MANAGING COMPLIANCE WITH LAWS AND REGULATIONS

### 37: Manage workplace health and safety

#### 37.2 operate a safe and healthy environment for employees and customers

*Why is this subskill important?*

- to comply with all applicable legislations and regulations
- to ensure the safety and well-being of employees and customers
- to minimize the impact of emergency situations on one's organization and the individuals involved
- to prevent accidents or incidents
- to protect the organization's property
- to mitigate conditions that could lead to liability

Knowledge of:

- safety legislation and guidelines
- occupational health and safety regulations
- Workers Compensation Board regulations and reporting procedures
- the legal responsibilities of employers and workers for site safety
- emergency preparedness
- accident prevention

Ability to:

- develop and implement a safety plan
- implement and monitor employee training on health, safety, security, emergency guidelines and injury prevention
- review and update employee training as needed
- promote a culture of health, safety and welfare
- enforce safety guidelines
- maintain a safe work environment
- communicate and administer occupational health and safety regulations

- establish emergency preparedness response measures
- establish procedures for different types of emergencies
- prepare for emergencies related to the supply of services
- establish procedures for the emergency shut-off of services
- ensure the availability and accessibility of health and safety facilities, equipment, resources and supplies
- ensure clear signage, labels, warning signs and notices
- ensure that emergency lighting systems are in good working order
- ensure that fire detection and fire extinguishing equipment are in proper operating condition
- ensure the availability of emergency and first aid equipment and supplies
- ensure that personal protective equipment is available and used when necessary
- orient workers, crew members and visitors on issues of health, safety and welfare
- monitor and supervise crew activities for safe work practices and procedures
- conduct safety inspections and spot checks of premises
- detect health and safety infractions
- maintain occupational health and safety records and reports
- conduct accident investigations
- ensure the completion of accident logbooks after each incident

*Relevance: 4*

*Criticality: 4*

*Frequency: 2*

*Mastery Time: 5 months*



### 38. Manage compliance with environmental laws and regulations

#### 38.1 comply with environmental laws and regulations

*Why is this subskill important?*

- to satisfy moral and legal obligations
- to prevent liabilities
- to reduce the carbon footprint of one's organization

Knowledge of:

- applicable environmental laws and regulations
- the environmental policy of one's organization
- customer expectations regarding corporate responsibilities for environmental protection

Ability to:

- develop a program to comply with applicable environmental laws and regulations
- implement and enforce environmental compliance programs
- monitor environmental compliance programs
- assess and review environmental compliance programs

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 4 months

#### 38.2 develop workplace policies that support sustainable practices

*Why is this subskill important?*

- to reduce the carbon footprint of one's organization
- to comply with local legislation and regulations
- to contribute to triple bottom-line accounting

- to support best practices and corporate social responsibility

Knowledge of:

- sustainable development
- sustainability principles
- the interconnectedness and interdependency of economic, social and environmental issues
- triple bottom-line accounting
- the business case for sustainability
- the limits of an area's carrying capacity
- life cycle management approaches

Ability to:

- develop policy that reflects an organizational commitment to sustainability
- think imaginatively and creatively
- adhere to legislation to protect the environment
- demonstrate leadership on issues of sustainability
- understand shared responsibilities for efficient resource use
- recognize the need to use renewable resources
- understand factors that contribute to resource degradation
- understand the principles of continual improvement
- use a systems approach for thinking and analysis
- make efficient, timely, accountable and cross-sectoral decisions
- realize that today's decisions must be balanced with tomorrow's effects

*Relevance:* 3

*Criticality:* 3

*Frequency:* 2

*Mastery Time:* 6 months

## MANAGING COMPLIANCE WITH LAWS AND REGULATIONS

### 38: Manage compliance with environmental laws and regulations

#### 38.3 promote sustainable practices in food and beverage operations

*Why is this subskill important?*

- to reduce the carbon footprint of one's organization
- to comply with local legislation and regulations
- to contribute to triple bottom-line accounting
- to support best practices and corporate social responsibility

Knowledge of:

- legal requirements and environmental policies
- organizational policies and practices
- the interconnectedness and interdependency of environmental, economic and social systems
- the effects of environmental degradation on health and safety
- recycling

Ability to:

- research and update legal knowledge to ensure compliance with legislation
- identify the environmental impact of work activities and resource utilization
- evaluate the impacts and consequences of actions taken
- modify work activities and resource utilization to reduce negative impacts on the environment
- apply precautionary principles
- practise cross-functional and multi-criterial thinking
- consider multiple perspectives in decision-making processes
- develop a business case for environmental protection
- implement strategies for minimizing resource use and improving resource efficiency
- set targets for improving resource usage and sustainable work practices
- promote the responsible use of resources

- minimize waste and view waste as a potential resource
- implement recycling policies and practices
- implement charity donation policies for unused perishable supplies
- control the environmental impact of food preparation and services
- select environmentally-friendly materials, products and processes
- produce manuals to train employees on environmental best practices
- motivate employees to contribute to the improvement of environmental performance
- secure the advice of specialists on environmental issues when necessary
- implement performance improvement strategies
- monitor performance and improvement strategies

*Relevance: 2*

*Criticality: 2*

*Frequency: 2*

*Mastery Time: 6 months*



# FOOD AND BEVERAGE MANAGEMENT INTERNATIONAL COMPETENCY FRAMEWORK

MAJOR CATEGORY	SKILL	SUBSKILL
<b>A. MANAGING WITH ENGAGEMENT</b>	<b>1. Manage ethics and integrity standards</b>	1.1 set ethics and integrity standards
		1.2 manage with ethics and integrity
		1.3 exhibit professionalism in conduct
	<b>2. Demonstrate leadership</b>	2.1 provide leadership
		2.2 engage employees to improve productivity
		2.3 promote continuous improvement
		2.4 manage stakeholder relationships
	<b>3. Keep up to date through professional development</b>	2.5 manage change
		2.6 manage time
		2.7 delegate work
<b>4. Promote sustainability</b>	3.1 determine professional development needs	
	3.2 participate in professional development	
	2.8 solve problems	
<b>5. Manage communication functions</b>	4.1 promote triple bottom-line accounting and reporting	
	4.2 promote sustainable practices	
		5.1 manage internal communications
		5.2 manage external communications

MAJOR CATEGORY	SKILL	SUBSKILL
<b>B. MANAGING BUSINESS OPERATIONS</b>	<b>6. Develop corporate strategies</b>	6.1 plan corporate strategies 6.2 implement corporate strategies
	<b>7. Develop a business plan</b>	7.1 analyze business opportunities 7.2 prepare a business plan
	<b>8. Manage projects</b>	8.1 plan a project 8.2 supervise project implementation 8.3 conduct meetings
	<b>9. Lead research and development strategies</b>	9.1 develop new concepts for products and services 9.2 establish a funding and financial structure 9.3 manage the financial transformation of a business
	<b>10. Manage business risk</b>	10.1 assess risks 10.2 eliminate or control business risk
	<b>11. Analyze outsourcing opportunities</b>	11.1 conduct a feasibility assessment of outsourcing 11.2 implement outsourcing plans 11.3 manage assets
	<b>12. Manage compliance with franchisee, licensee and legislative requirements</b>	12.1 develop a compliance strategy 12.2 implement a compliance strategy 12.3 undertake scheduled compliance audits
	<b>13. Implement marketing strategies</b>	13.1 conduct a situational analysis 13.2 implement an integrated marketing plan

MAJOR CATEGORY	SKILL	SUBSKILL
<b>C. MANAGING FINANCIAL RESOURCES</b>	<b>14. Administer budgets</b>	14.1 prepare budgets 14.2 operationalize budgets
	<b>15. Manage financial transactions</b>	15.1 manage point-of-sale systems 15.2 manage receivables and payables
	<b>16. Manage profit and loss</b>	16.1 control expenses 16.2 optimize revenues
	<b>17. Manage payroll</b>	17.1 establish a payroll system 17.2 control payroll expenses
	<b>18. Manage staffing operations</b>	18.1 devise an employee compensation and welfare system 18.2 hire employees 18.3 facilitate employee orientation 18.4 develop an employee handbook
	<b>19. Manage employee training and development</b>	19.1 assess training needs 19.2 develop training programs 19.3 deliver employee training 19.4 evaluate the effectiveness of training
	<b>20. Organize schedules</b>	20.1 develop scheduling guidelines 20.2 schedule staff
	<b>21. Manage employee performance</b>	21.1 develop a performance management program 21.2 conduct performance reviews 21.3 apply reward and disciplinary measures 21.4 manage grievances
	<b>22. Manage succession planning</b>	21.5 manage an employee exit process 22.1 implement a succession plan 22.2 manage succession development
	<b>23. Manage workplace climate</b>	23.1 manage workplace diversity 23.2 maintain a positive workplace environment
<b>D. MANAGING HUMAN RESOURCES</b>		

MAJOR CATEGORY	SKILL	SUBSKILL
<b>E. MANAGING PHYSICAL RESOURCES</b>	<b>24. Plan food and beverage facilities</b>	24.1 manage the set up of food and beverage facilities
		24.2 plan equipment needs for food and beverage facilities
	<b>25. Manage food and beverage facilities and equipment</b>	25.1 manage the maintenance of physical resources
		25.2 manage the maintenance of operating equipment
<b>F. MANAGING PROVISIONING OF SUPPLIES</b>	<b>26. Manage supply chains</b>	26.2 manage supplier contracts
	<b>27. Manage stock</b>	27.1 order stock
		27.2 control inventory
<b>G. MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS</b>	<b>28. Plan food and beverage production and service</b>	28.1 develop an operational plan
		28.2 integrate digital technology systems
		28.3 engineer recipes and menus
	<b>29. Manage service delivery</b>	28.4 manage food presentation
		28.5 manage food portion sizes
		28.6 develop a beverage program
<b>30. Manage food and beverage production</b>	28.7 maintain organizational records	
	29.1 manage a shift	
	29.2 manage opening and closing operations	
<b>31. Manage food and beverage service operations</b>	30.1 monitor food and beverage preparation	
	30.2 maintain standards for food and beverage production operations	
<b>31. Manage food and beverage service operations</b>	31.1 monitor food and beverage service operations	
	31.2 maintain standards for food and beverage service operations	

MAJOR CATEGORY	SKILL	SUBSKILL
<b>G. MANAGING FOOD AND BEVERAGE PREPARATION AND SERVICE OPERATIONS (CONTINUED)</b>	<b>32. Manage events</b>	32.1 plan events 32.2 monitor events
	<b>33. Manage front- and back-of-house cleaning and sanitation</b>	33.1 monitor housekeeping procedures 33.2 oversee uniform service and upkeep
	<b>34. Manage customer reception</b>	34.1 manage customer reservations 34.2 manage the customer experience 34.3 manage customer arrivals and departures
	<b>35. Manage customer loyalty</b>	35.1 promote service excellence 35.2 capture customer feedback 35.3 manage customer information 35.4 manage service recovery
	<b>35.5 manage customer security</b>	
<b>H. MANAGING CUSTOMER SERVICE</b>	<b>36. Manage food and beverage safety and compliance programs</b>	36.1 manage physical risk 36.2 manage compliance with applicable laws and regulations 36.3 implement a food and beverage safety management plan 36.4 promote the responsible service of alcohol
	<b>37. Manage workplace health and safety</b>	37.1 manage compliance with workplace health and safety regulations 37.2 operate a safe and healthy environment for employees and customers
	<b>38. Manage compliance with environmental laws and regulations</b>	38.1 comply with environmental laws and regulations 38.2 develop workplace policies that support sustainable practices 38.3 promote sustainable practices in food and beverage operations
<b>I. MANAGING COMPLIANCE WITH LAWS AND REGULATIONS</b>		



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# STANDARDS AND CERTIFICATION DEVELOPMENT PROCESSES

## PRINCIPLES

Principles guide all stages in the development of *emerit*<sup>®</sup> occupational standards and certification programs. This results in standards and programs that are:<sup>1</sup>

- Accessible, equitable and fair—All individuals have equal access to relevant information and the opportunity to participate effectively.
- Coherent and rigorous—Information is developed and presented in a logical and consistent manner.
- Confidential—Policies and procedures are used to ensure personal information of committee members is treated as confidential, and information is accessible only to those authorized to have access.
- Consensual—A consensus process is used to make decisions.
- Current, relevant and valid—Information is credible, applicable and up to date.
- Feasible and sustainable—There is a commitment to sufficient resources for the project and to plans for the ongoing continuity and prosperity of the occupational standards and certification program.
- Flexible—Occupational standards and certification programs are designed to work in a range of workplace or educational contexts; users may use the programs in their entirety, augment other programs or adapt the programs for specialized needs.
- Harmonized—Existing relevant norms (e.g. policies, procedures, requirements) are factored into discussions to ensure consistency, currency and quality.
- Impartial and independent—Decisions are based on objective criteria.
- Open and transparent—Stakeholder groups are clearly defined, the process to be followed is clearly communicated and how the resulting information is used is shared with all involved. Individuals are provided access to information.
- Representative—An inclusive approach is used to enable all individuals with a significant interest in the issue be involved.
- Voluntary—Individuals affected or interested participate voluntarily and the outcome is voluntarily applied.

## STANDARDS DEVELOPMENT PROCESS

### Developed for industry by industry

Industry expertise and experience are the key ingredients to setting *emerit* occupational standards. Extensive participation by professionals in the occupation, corroborating research and careful validation ensure that *emerit* occupational standards are the most precise and relevant in existence.

*emerit* collaborates with people who work in and are affected by an occupation to produce realistic and comprehensive occupational standards. Expert job incumbents, supervisors, academics, researchers and other subject matter experts participate in a variety of activities to plan, develop, validate, ratify and ultimately help sponsor or promote the standards.

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<sup>1</sup> Adapted from the Alliance of Sector Council's *Setting the Standard: Accepted Principles and Recommended Practices* (2009).

*emerit* occupational standards are developed based on market need and demand. They serve many purposes, both informing and influencing practice. The standards may be used for programs or services that:

- recognize the competence (e.g. prior experience, skills, knowledge, relevant credentials) of expert practitioners
- improve career image, assist with career guidance and attract and retain talented practitioners
- educate or train individuals in the profession (e.g. academic curriculum, workplace-based training)
- improve learner and worker mobility, program articulation or credit transfer
- facilitate organizational development or change-management requirements (e.g. job design, succession planning)
- improve or clarify human resource management practices (e.g. recruitment, selection, performance reviews, job descriptions)

*emerit* occupational standards are designed to improve the quality of service, increase productivity and inform better safety and security practices. Standards ultimately foster a globally competitive workforce.

### **Steps in the development process**

1. Norm referencing, data collection—A solid body of information is collected to help define the occupational standard. The prevailing norms (i.e. standards, regulations, curriculum, other well-documented material that informs practice), from within Canada and from other countries, are consulted and benchmarked.
2. Stakeholder consultation—Qualified industry experts, who represent practitioners with a significant interest in the standards, are consulted to inform the contents of the occupational standards. Various means are used to acquire meaningful and comprehensive input (i.e. in-person meetings, surveys, web-based sessions). The goal is to obtain input from the largest sample of practitioners possible.
3. Secondary, corroborating research—Job analysts prepare a comprehensive draft of the occupational standards building on the information collected from the first two phases. Stakeholders are further consulted to verify data and to finalize the draft version of the occupational standards.
4. Validation—Qualified industry experts (including those involved earlier in the process, as well as additional practitioners) review the draft occupational standard to verify that the standard is accurate, complete and relevant. This process ensures that the new or updated occupational standard has the appropriate scope and specificity to inform current practice in the occupation.
5. Ratification—An advisory panel verifies that the processes followed adhere to program quality requirements and that the occupational standard is suitably validated. The panel endorses the standard, indicating the standard is ready for publication and release.
6. Publication—Once final quality edits, translation (i.e. adaptation of the standards to the second official language) and design elements are completed, the occupational standards are made available to the public.

## CERTIFICATION DEVELOPMENT PROCESS

### Recognizing competence

Industry-defined credentials play an important role in recognizing competent professionals. *emerit* certification is based on industry-defined occupational standards, and is awarded to individuals who demonstrate sufficient knowledge, meet performance expectations and acquire the experience of a competent practitioner.

### Steps in the development process

1. Develop a blueprint—After careful review of the occupational standards, a qualified team of assessment specialists works closely with a group of representative industry experts to define the assessment strategy, indicating the assessment tools that will be used, skills to be assessed (and their relative importance), prerequisites for eligibility and administration requirements.
2. Develop assessment tools—The assessment specialists, in consultation with qualified industry experts from the occupation, create assessment instruments that will be used to measure the applied knowledge and skills (behaviours) at the level defined in the occupational standard.
3. Validate assessment tools—Qualified industry experts undergo training and, under the guidance of an assessment specialist, review and validate each component of the assessment process, as well as set the passmarks.
4. Prepare administrative elements—Tools to support program administration are completed. These include the material to guide assessors and program administrators.

Once all program elements are completed and the program has been adapted to the second official language (French/English), the *emerit* certification program is launched. Ongoing data and statistics are collected on the usage of the program to monitor the quality and to gather information for updates.