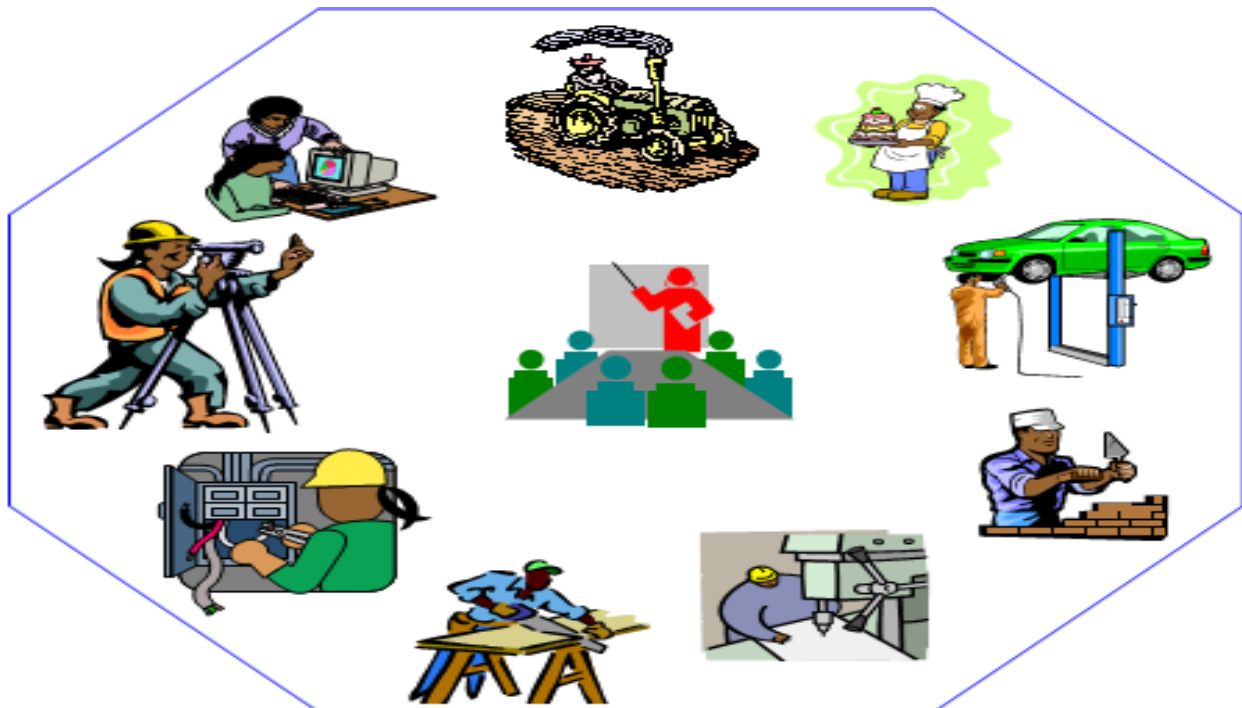




# Edible Oil and Fats Processing

## Level - III

Based on October 2019, Version 2 OS and March.  
2021, V1 Curriculum



**Module Title: - Monitoring Implementation of Work  
Plan/Activities**

**LG Code: IND EOP3M030LO (1-4) LG (9-12)**

**TTLM Code: IND EOP3TTLM 0321v1**

March, 202



United Nations  
Educational, Scientific and  
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## Table of Contents

<b>LO #1- Monitor and improve workplace operations .....</b>	<b>1</b>
Instruction sheet .....	1
Information Sheet-1 Monitoring workplace operations efficiency and service levels.....	2
Self-check -1 .....	4
Information Sheet-2 Supporting operations of overall enterprise goals and quality assurance initiatives .....	5
Self check -2.....	7
Information Sheet-3 Identifying and adjusting quality problems and issues promptly .....	8
Self check -3.....	12
Information Sheet-4 Changing procedures and systems in consultation with colleagues .....	13
Information sheet – 5 Consulting colleagues about ways of improving efficiency and service levels.....	17
Self-check 5.....	19
<b>LO #2- Plan and organize workflow .....</b>	<b>20</b>
Instruction sheet .....	20
Information sheet -1 Assessing current workload of colleagues accurately .....	21
Self-check 1 .....	25
Information sheet. 2 Scheduling work .....	26
Self-check 2.....	30
Information sheet 3 Delegating work.....	31
Information sheet .4 Assessing workflow against agreed objectives and timelines .....	34
Information sheet .5 Assisting colleagues in prioritization of workload .....	37
Self-check 5.....	39
Information sheet 6 providing input of appropriate management regarding staffing needs.....	40
Self-check 6.....	43
<b>LO #3- Maintain workplace records .....</b>	<b>44</b>
Instruction sheet .....	44
Information sheet-1 Completing and submitting workplace records within required timeframes.....	45
Self check 1 .....	47

Information sheet - 2 delegating and monitoring appropriate completion of records prior to submission.....	48
<b>LO #4- Solve problems and make decisions.....</b>	<b>51</b>
Instruction sheet .....	51
Information sheet-1 Identifying and considering workplace problems .....	52
Self- Check 1 .....	55
Information sheet   2 Initiating short term actions of resolving immediate problem .....	56
Self- Check 2.....	58
Information Sheet- 3 Analyzing problems long term impact.....	59
Information sheet 4 Assessing potential solutions of consultation with relevant colleagues.....	63
Self check 4 .....	65
Information sheet -5 Encouraging participation of team members solving of raised problem.....	66
Self check 5 .....	67
Information sheet- 6 Taking follow up action of monitoring effectiveness of solutions in the workplace.....	68
Operation Sheet 1 .....	<b>Error! Bookmark not defined.</b>
LAP Test .....	<b>Error! Bookmark not defined.</b>
Reference Materials .....	70



<b>LG #9</b>	<b>LO #1- Monitor and improve workplace operations</b>
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**Instruction sheet**

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Monitoring efficiency and service levels
- Supporting operations of overall enterprise goals and quality assurance
- Identifying and adjusting quality problems and issues promptly
- Changing procedures and systems in consultation with colleagues
- Consulting colleagues about ways of improving efficiency and service levels

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Monitor efficiency and service levels
- Support operations of overall enterprise goals and quality assurance
- Identify and adjust quality problems and issues promptly
- Change procedures and systems in consultation with colleagues
- Consult colleagues about ways of improving efficiency and service levels

**Learning Instructions:**

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks



## Information Sheet-1 monitoring workplace operations efficiency and service levels

### 1.1. Introduction

The workplace is where employees perform their work. Typically workplace conditions are stipulated by regulatory agencies and technical documentation and controlled by the employer. But, with more staff members working from home, many times workplace control is no longer possible. Employers find themselves leaving it up to employees to decide their environment. In this article, we will discuss on-site workplace management that is controlled by the employer. Generally, the workplace should be designed or adapted to helping employees perform at the highest level possible. When evaluating a workspace one should consider both technical and ergonomic standards.

Monitoring the operations of the workplace is necessary and it's advisable for larger businesses to establish an internal labor protection department. In various industries and for small businesses public agencies often fulfill this role. Its purpose is to monitor workplace safety and effectiveness:

- Establish operational guidelines for safety
- Provide a competent specialist as a resource to the company and employees
- Understand regulatory requirements for the industry or work being performed
- Recommend appropriate insurances and process to workplace injuries
- Planned modernization for weary processes
- Design appropriate schedules for optimal work production and staff performance

### 1.2. Improving workplace operations

A process improvement plan can help in improving the internal functions of the company. This improvement plan can also increase operational efficiency and decrease operational costs. Some of the ways to improve workplace operations are:

- Create a friendly environment in the workplace. Every employee must be treated fairly with an open-door policy. Open communication is one of the fundamental elements in the workplace.



- It is essential to set the benchmark goals for every department. Setting the benchmark will help the employees performing their tasks efficiently and timely, which will eventually improve business operations.
- Involving every employee, in-process monitoring improves workplace operations. The managers of an organization can conduct service-level operations like desk-side observations and call monitoring. Moreover, a manager should also analyze the reports of a firm and the current operational procedures.
- Quality testing can also contribute a lot in improving the workplace operations, and low-level employees can conduct it.
- The managers should monitor the data regularly to look for any differences in the system

### **1.3. Monitor work operations**

Monitoring is a process of determining how the plans are being implemented. Work operations refer to the work itself and include systems and procedures, staff performance, and levels of service in the workplace. These operations can include:

- Service delivery – ensuring staff provide the level of service established/determined as appropriate for the establishment or department.
- Customer satisfaction – generating feedback from customers about how they perceive the service being provided.
- Products supplied and the nature of them – this can be the physical aspects and facilities of the oil product, oil byproduct, food and entertainment we supply
- Dealing with paper work – some staff may have as their main role the generation and administration of documentation: this has immediate impact on customers and internal calculation of statistics.

**Self-check -1****Written test**

**Directions:** Answer the following questions listed below. Use the Answer sheet provided in the next page: choose best answer and circle on it.

1. ---- is providing the direction, support, encouragement, feedback and training staff need to do their job well (2 point)

A. Planning      B. Organizing      C. Leading      D. All

2. A manager is responsible for coordinating the work people due to achieve specific goals (2 point).

A. True      B. False

3. .... is a process of determining how well our plans are being implemented (2 point)..

A. Monitoring      B. Planning      C. Organizing      D. All

4. Organizing and coordinating of the planned activities in order to achieve their defined objectives(2 point).

A . Management      B. Observation      C. Directing      D. None

5 . From the following one is not a part of management function (2 point).

A. Leading      B. Autocratic      C. Organizing      D. Monitoring

**Note: Satisfactory rating 10 points**

**Unsatisfactory - below 10 points**



## Information Sheet-2 supporting operations of overall enterprise goals and quality assurance initiatives

### 2.1 Introduction

Managements have responsibility for ensuring that operations in the establishment support the overall enterprise goals and, in some instances, quality assurance initiatives. This pre-supposes goals, objectives and targets do in fact exist, and they have been communicated to the appropriate staff and managers. It is not safe to assume either or both of these exist or have been done.

### 2.2 Enterprise goals and quality initiatives

Many organizations have a way of operating called total quality management (TQM). This basically means all employees are involved in continually improving the level of service, productivity and customer satisfaction. TQM is regarded as a positive thing for organizations to be, or strive to become.

#### 2.2.1. In a TQM organization:

- There must be full, top-down management commitment, support and understanding of the TQM philosophy
- It is important to get work systems and processes right
- Involvement of the whole workforce is necessary and this is done through teams
- Customer needs are identified and met
- Problems and issues are promptly identified and adjustments are made accordingly.

If an organization has adopted a TQM philosophy, then its goals and workplace operations will reflect this approach.

### 2.3 Monitor and adjust overall enterprise goals and quality assurance

There are good reasons to monitor progress and adjust plans. The benefits are:

- Things are more likely to happen as planned
- Management and staff actually know what's going on in the business
- Problems are identified and corrected
- Service and product are consistent over time
- Work operations fit with work and organization goals
- Staff feel supported and involved
- Customer needs are met.





## **2.4 Monitored in a quality environment**

Monitoring in a quality environment doesn't just rely on the inspection and checking of procedures and work done is a total concept where by quality is built into every aspect of work operations and there is a continual process of improvement. It doesn't blame individuals but rather concentrates on seeking better ways to do things.



<b>Self-check -2</b>	<b>Written test</b>
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**Directions:** For the following questions, say true if the statement is correct and false if it is incorrect (wrong).

1. TQM is not regarded as a positive thing for organizations (3.5 point).
2. Manager has the final responsibility for determining whether the goals set by the organization are achieved (3.5 point).
3. In a TQM organization Customer needs are identified and met (3 point).

**Note: Satisfactory rating – 10 and Unsatisfactory - below 10 points**

**Answer Sheet**

**Score=\_\_\_\_\_**

**Rating:\_\_\_\_\_**



## Information Sheet-3 Identifying and adjusting quality problems and issues promptly

### 3.1. Introduction

Managers need to identify quality problems and issues quickly and take appropriate action swiftly. Failure to identify these issues and act appropriately creates an enormous potential for negative consequences for the organization including lack of repeat business, damage to the reputation of the venue and general decline in sales and profit. An on-going approach to monitoring workplace operations is needed to identify and address these situations.

### 3.2. Scope of authority

In most cases, no explicit approval will be required to take remedial action to address identified quality and other issues. It will be assumed responsibility for taking such action resides with the job position. It is intrinsic to the successful and responsible execution of that role. The ability of staff to take unilateral action in response to an issue is called their scope of authority and it will be prescribed by management. Different positions have different scopes of responsibility. Where an issue falls outside their scope of responsibility, approval to take action may need to be obtained from:

- The department manager
- Other more senior/experienced staff
- The owner
- The establishment manager.

The extent of approval („authorization”) required will depend on the factors that apply to the issue under consideration.

These may include:

- Costs involved
- Alterations required to existing Standard Operating Procedures
- Impact on other areas
- Impact on other staff
- Impact on customers
- Impact on service levels.



### **3.3. When to monitor work operations**

Monitoring should be occurring all the time. It can predict problems ahead of time, monitor or review after the event. All of these are legitimate and effective forms of monitoring and most managers will use all three from time-to-time, depending on the situation.

#### **3.3.1. Anticipate problems**

This involves being able to „read ahead“ and see certain systems or behaviors are probably going to result in problems or poor results. For example, by predicting an employee is going to be overloaded on a public holiday and therefore rostering on another staff member a problem has been averted and a possible problem may have been converted into a positive outcome.

#### **3.3.2. Correct problems as they happen**

This involves being able to identify and solve problems as they occur, and being able to see the effects of making certain changes. This is not necessarily an easy thing to do, because of workload and time constraints. For example, an accident has happened in the oil industries because oil was carrying glasses in his hand which resulted in many trips between the bar and tables, greater spillage and also reduced levels of hygiene. The problem was acted on immediately and a decision was made to ensure staff always use eat trays.

#### **3.3.3. Correct problems after the event**

Sometimes it is just not possible to anticipate a problem or to correct them as they happen. The benefit of hindsight allows us to take time to review, reflect, consult and then make changes. Also, sometimes problems are cumulative, meaning that many small instances can lead to a bigger overall problem.



### 3.4. Steps in monitoring

The following are the basic steps to undertake when monitoring:

#### **Work out what needs to be monitored**

Not everything can or should be monitored all the time. Some things will have been recently reviewed and are progressing well. Some systems generated reports will show that goals are being achieved according to plan and therefore no further investigation is required. Generally, things to be monitored include:

- Areas showing early warning signs things are not going according to plan
- Areas of critical activity to the organization – high revenue raising streams, areas subject to intense legal scrutiny
- Areas due for scheduled review.

#### **3.4.1. Decide on methods or measures to use**

This is where you decide how to measure your progress. This involves using tools to help you do this. They include:

- Observation
- Statistical and written reports
- Surveys
- Checklists
- Flowcharts
- Benchmarking.

#### **3.4.2. Compare what is happening with what should be happening**

Here you review and analyze what's actually happening. You may refer back to your original goals, objectives or targets and, using various tools, compare your progress against these targets. Sometimes you will realize your original target was unrealistic or there have been changes that require you to adjust your original target.



### 3.5. Methods of monitoring

The methods chosen for monitoring performance are generally built into the planning process. It is a good idea when planning to keep in mind the reporting on the success or otherwise of goals. It is frustrating to set a goal but not be able to say whether or not it has been achieved. There are many tools or methods available to monitor progress or outcomes of work operations. Some examples are:

- Reports – statistical, financial, written or verbal
- Obtaining customer feedback – verbal or written, individual or focus groups, structured or unstructured in format
- Using a pretend customer – getting someone to pretend to be a customer in your premises and then critically feeding back what it was like, what could be improved etc.
- Walking about the premises and observing what takes place and how it could be improved, what could be improved
- Use of checklists to tick off whether or not required service points are being adhered to by front line staff when they interact with customers
- Brainstorming sessions where staff are asked to contribute any thoughts or ideas they may have about improving a particular aspect of service, or about introducing a new initiative
- Staff input and review – obtaining „grass roots“ input to potential and actual problems, and asking those directly concerned about how the situation can be resolved.



<b>Self check -3</b>	<b>Written test</b>
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**Directions:** For the following questions, say true if the statement is correct and false if it is incorrect (wrong).

1. An on-going approach to monitoring workplace operations is needed to identify and address these situations.
2. Monitoring should not be occurring all the time.
3. Not everything can or should be monitored all the time.
4. Sometimes it is just not possible to anticipate a problem or to correct them as they happen.
5. Reports are not methods available to monitor progress or outcomes of work operations.

**Note: Satisfactory rating – 3 and above points**  
**points**

**Unsatisfactory - below 3**

**Answer Sheet**

**Score=\_\_\_\_\_**

**Rating:\_\_\_\_\_**



## **Information Sheet-4 Changing procedures and systems in consultation with colleagues**

### **4.1. Introduction**

Adjustment of internal procedures and systems to improve efficiency and effectiveness is an on-going exercise, and involves monitoring of the internal and external environments, and the integration of findings into future planning as well as current practices.

### **4.2. Workplace changes**

Changes in the internal and external environments impacting on workplace operations may include:

#### **4.1.1 Management changes**

Changes in management may entail a variation in orientation to service, or the setting of some new directions in relation to several other factors. What was acceptable under the previous management may not be acceptable to the new management. This doesn't mean what was done before was wrong. It just means the new approach is different. Note too, changes in management often herald changes in client focus, and the creation of new and different target markets which, by their nature, will usually demand a change to practices and standards.

#### **4.1.2 Organizational re-structures**

The trend is to reduce or eliminate middle level management and with that comes new responsibilities for all concerned. As the organization restructures, new roles for all staff in relation to numerous tasks (such as customer service, technical skills) will emerge. People will have their responsibilities enlarged, or their focus altered. To state the obvious, the industry is always in a state of change whilst sometimes desiring to portray the impression of tradition and stability. All this means new work operations may emerge and established ones cease to exist, or be extensively modified.

#### **4.1.3 Introduction of new equipment**

New equipment means training for staff and also requires that staff can explain the new equipment/facility, be it a product or a service, to customers.





The arrival of the new equipment may have been necessitated by competition, brought about by down-sizing of staff or required by legislation. This reality means managers must explain the new equipment and accompanying procedures to staff as well as organize and allow time for sufficient staff training and practice.

#### **4.1.4 Recruitment practices**

There may be a need to become more professional and more targeted in the recruitment of staff. This may require premises to establish comprehensive job descriptions and job specifications before advertising for staff, and then select staff based on how well these individuals match the stated job requirements.

#### **4.1.5 Environmental issues**

The demand for quality in the outer environment will place greater demands on how companies conduct their business, which sources of energy they use, and how they design their products: more establishments will seek to portray publicly their „green“ and environmentally friendly image.

#### **4.1.6 Technological development**

Technological development has played a key role in the structural changes in the service sector. Boundaries between transportation, communication, travel-service and hospitality industries are disappearing as internet-based services proliferate.

#### **4.1.7 Developing standards and plans**

The time spent actively considering for establishment's orientation to adjusting procedures and systems should result in a set of standards and plans. These must be in writing so everyone can be sure about them, understand what they mean, and know what is expected of individual staff members. The precise nature of the standards and plans will vary between venues, and may even vary between departments within the same venue.

#### **4.1.8 Document presentation standards**

Policies may be prepared that specify document requirements for letters, menus, forms, invitations, reports, etc. These may apply to format, type size, font, English or American spelling, and layout. They may dictate salutations, signatures required and closures. They may also specify copies required and filing requirements.



#### **4.1.9 Complaint management**

Any complaint really is an opportunity to rectify a problem, or make a long-lasting customer, providing they are dealt with quickly, properly and fully. The standards should specify the steps to be taken for a range of complaints. There are several predictable complaints we are likely to get so it is possible to predict the majority of them. For every customer who actually does complain, there are probably another ten that had grounds to, but haven't. Simply stated, customers like to have their complaint treated seriously, acted on quickly and be apologized to.

### **4.3. Further approaches to adjusting procedures and systems.**

#### **4.3.1. Approaches to the staff may include:**

- Providing education and training service to staff, and aids and methods which help them to produce measurable improvements in quality
- Involving staff in planning and implementing quality improvement
- Building a spirit of working together towards goals
- Having instruments and channels to disseminate the company's philosophy, goals and values throughout the organization
- Promoting a climate of open communication and feedback
- Encouraging and recognizing innovation and teamwork
- Recognizing the right of every employee to understand the requirements of his/her assignment and to be heard when offering suggestion for improvement.

#### **4.3.2. Approaches to the customers may include:**

- Making the customer a „member“ of the organization as opposed to a „customer
- Rewarding faithful customers – with special deals, discounts, verbal acknowledgment and thanks
- Communicating with customers in a way that promotes goodwill, trust and satisfaction
- Identifying customer's un-stated needs
- Ensuring customers' needs and reasonable requests are met
- Ensuring customers' needs and reasonable requests are met



<b>Self-check 4</b>	<b>Written Test</b>
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**Directions:** For the following questions, say TRUE if the statement is correct and FALSE if it is incorrect (wrong).

1. An on-going approach to monitoring workplace operations is needed to identify and address these situations (2 point).
2. Monitoring should not be occurring all the time (2 point).
3. Not everything can or should be monitored all the time (2 point).
4. Sometimes it is just not possible to anticipate a problem or to correct them as they happen (2 point).
5. Reports are not methods available to monitor progress or outcomes of work operations (2 point).

**Note: Satisfactory rating – 10 and**

**Unsatisfactory - below 10 points**

**Answer Sheet**

**Score=\_\_\_\_\_**

**Rating:\_\_\_\_\_**



## **Information sheet – 5 Consulting colleagues about ways of improving efficiency and service levels**

### **5.1. Introduction**

Effective managers will recognize the need to consult with colleagues about the best ways to improve efficiency within their unit or department, and to raise customer service levels. Useful consultation means that staff must be actively encouraged to provide input to the development of quality customer service, and to the identification and resolution of issues that impact on its delivery.

### **5.2. Consultation advice**

Consultation with staff should include:

- Encouraging staff to feedback all relevant comments from customers – most people won't make a formal complaint but will often make deliberate and pointed comments in front of staff. These must be reported back where they are central to improving service delivery
- Not shooting the messenger : if staff are to be encouraged to feedback negative criticism, it is very important not to criticize them simply for delivering the bad news
- Establishing agenda items: every staff meeting should have a standing agenda item for "quality feedback" or similar. These staff meetings should be regular in nature, be made compulsory, and have provision for getting the information that arises back to staff that weren't there due to sickness, leave or RDOs
- Providing written protocols: these ensure everyone is aware of the same thing in regard to service delivery, quality standards and establishment practices. Never assume staff knows exactly what is required. They may never have actually been told. Far too many things exist in the workplace as matters which have evolved over time without any real direction, support or structured dissemination
- Providing for written feedback: the establishment should have documents for staff to complete in writing if they don't feel comfortable with delivering verbal feedback.

### **5.3. Provide feedback to colleagues and management to inform future planning**

Businesses always look for managers to make incisive and intelligent contributions about how the property should be operated and how things can be improved – refer earlier



comments regarding TQM. This is because operators realize managers and staff are the front-line people in the organization.

It is they who have regular contact with customers so it is they who should be best placed to give feedback about ideas that may enable the property to better meet the future needs of customers. Remember, all businesses should strive to be customer focused and all significant changes to service provision need to be appropriately planned.

#### **5.4. The sources of information**

There are many sources of useful information. Some of these are generic in nature and others are specific to the industry.

- Written material
- Internet
- Conferences and seminars
- Product launches
- Industry associations
- Colleagues, supervisors and managers
- Market research data
- More on developing your own industry network
- Talking to the reps

#### **5.5. Steps after collecting information**

Information has no value unless it is used. When they have the information should:

- Take the time to read, digest and understand it – what is it saying? Is it applicable to venue or department? How is it relevant?
- Determine the impact of incorporating this knowledge in to the operation of the property
- Consider the costs of implementing the knowledge – what would it cost? Also consider the cost to the venue of not introducing or acting on this information
- Talk to others – to get their opinion and input. What are their thoughts? Do they agree with you are do they hold contrary views? What are their reasons for agreeing or disagreeing?
- Generate a proposal – detailing what you want to introduce or change and why. Make sure the proposal is coasted and details how the proposal would be implemented and the flow-on impacts on other areas



<b>Self-check 5</b>	<b>Written Test</b>
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- Make a presentation to senior management about your idea.

**Directions:** For the following questions, say TRUE if the statement is correct and FALSE if it is incorrect (wrong).

1. All businesses should make every effort to be customer focused.
2. Effective managers will recognize the need to consult with colleagues.
3. Information has no value unless it is used.

**Note: Satisfactory rating – 2 and above points**  
**points**

**Unsatisfactory - below 2**

**Answer Sheet**

**Score=\_\_\_\_\_**

**Rating:\_\_\_\_\_**



## LG #10

## LO #2- Plan and organize workflow

### Instruction sheet

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Assessing current workload of colleagues accurately
- Scheduling work
- Delegating work
- Assessing workflow against agreed objectives and timelines
- Assisting colleagues in prioritization of workload
- Providing input of appropriate management regarding staffing needs

This guide will also assist you to attain the learning outcomes stated in the cover page. Specifically, upon completion of this learning guide, you will be able to:

- Assesses current workload of colleagues accurately
- Schedule work in manner of enhancing efficiency & customer service quality
- Delegate work to appropriate people with principle of delegation
- Assesses workflow against agreed objectives and timelines
- Assist colleagues in prioritization of workload
- Provide input of appropriate management regarding staffing needs

### Learning Instructions:

1. Read the specific objectives of this learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks



## Information sheet -1 Assessing current workload of colleagues accurately

### 1.1 Introduction

As a managers are required to ensure that staff is able to meet targets and goals that have been established. This involves an understanding of and an ability to organize and manage work operations.

### 1.2 role of manager

Some of the essential elements of being a manager involve:

- Motivating staff
- Determining workloads
- Scheduling work
- Prioritizing work
- Organizing workflow
- Delegating work.

#### 1.2.1 Motivating staff

Focused and motivated staffs are more productive. Beyond earning an income, staff wants to contribute to the organization and see they are making a positive contribution.

As a manager you can increase their job satisfaction by:

- Taking an interest in their development – both at work and outside it
- Being clear to them about how you judge and measure their performance – so they know what you deem to be important, and what isn't. This is useful to them where they need to priorities their workload
- Caring about their safety, health and well-being, and taking visible steps to safeguard them
- Treating them personally – being respectful to them, using good manners and listening to them
- Giving them achievable objectives
- Giving them positive feedback and encouragement – especially where they fail to perform, so they learn that „trying” is the important aspect: few successful managers criticize staff for trying even when they don't achieve their goal.





#### **1.2.1.1. Motivates people to do their best**

Much of the motivation on research talks about incentives and rewards, which can be very successful in marketing and sales positions. However for many people, job motivation is driven by more personal reasons – money is frequently not a prime motivator but certainly can be in certain circumstances and to some people. The motivating factors can be:

- A sense of achievement
- Recognition for a job well done
- Enjoying the work itself
- Having responsibility
- Having opportunities for advancement.

#### **1.2.2 Determining workloads**

Workload is the amount of work an employee is required to do in a set period of time. As a manager your task is to ensure employees are not under-utilized or, conversely, overloaded with too much work. Of course this is not necessarily an easy task in the industry because of the peaks and troughs in business, and because of the uncertainty of unexpected arrivals, such as a bus load of tourists dropping in for afternoon tea or a quick unannounced dinner before the show. Staffs who work in this industry expect high volume periods of work. They understand it is part and parcel of the nature of the business. However, it is your responsibility to make sure most of the time staff have a manageable workload where they are kept busy but are not under continual stress. There are also sound business reasons for managing staff workload. If a customer waits too long for service, they will simply choose to go elsewhere – either right away or next time. There are a number of ways of determining an appropriate workload:

- This is worked out over time through practice and observation – this very much a “suck it and see” approach, which while sounding less than professional has much to recommend it, especially the fact it is rooted in practice, reality and actuality.
- Ask staff for their feedback – how did they feel? Did they feel stressed, under pressure? Or did they in fact enjoy the experience of being flat out?
- Be aware of other factors impacting on staff time and contributing to their total workload – they may be expected to undertake duties for other staff members, other departments, special guests or delegated managerial duties such as banking, counting money, stock taking or delivering stock.



- Prioritizing tasks into primary and secondary tasks such that the secondary tasks are ones to be done in quiet times.

### 1.2.3 Schedule workloads

Scheduling work in a manner that enhances efficiency and customer service quality can be seen to involve prioritizing work, and then organizing an appropriate workflow to achieve the set targets. Scheduling work means planning and allocating what tasks have to be done in a specific period of time, and by whom. Scheduling work is really the end result of:

- Working out the unit's priorities – which may be based on turnover, profit, covers, rooms provided or services, timing, establishing market share or whatever else is paramount at the time. The point being priorities shift over time. What was vital yesterday, may not even be a consideration next week.
- Working out the most appropriate workflow – this includes consideration of timing requirements, the physical availability of resources (physical and human), layout of the facility and equipment, and processes which have to be performed.
- Having assessed the staffing levels and the appropriate workload for individual staff members – which are based on your personal knowledge about individual abilities and capacities.
- Having decided on delegation of tasks – as a manager you cannot physically be in all places at all times and so you will need to delegate certain authorities to various staff from time-to-time. These staff need to prove they are responsible, committed and have the best interests of the company, the other staff and the customers at heart.

### 1.2.4 Prioritizing work

Prioritizing in this context involves deciding on, and placing tasks in, their most effective order of importance. This order must match with the identified goals and targets of the organization, and the objectives of individual work units, teams or departments. As a manager of a work unit or department you will be responsible for prioritizing the work of the unit. Staff will look to you for leadership in relation to where their efforts should be directed. Where you fail to deliver this direction, your credibility may suffer. The four basic steps in prioritizing work are:



- Involve staff in the process wherever possible
- Make three lists:
  - ✓ The essential tasks that absolutely, positively must be done no matter what with no excuses, no exceptions
  - ✓ Those tasks that are non-essential but that add quality to the performance of the department or unit
  - ✓ Those tasks that it would be nice to do if there is sufficient time but which are in no way important or essential
- Compare the lists you have generated with the overall goals and objectives of the unit
- Adjust the lists accordingly, allocate the work and take action to achieve the lists in priority order.

#### 1.2.5 Organizing workflow

Workflow is basically the order in which work is best done. Organizing this involves determining the logical sequence of tasks. The aim is to make sure the job is done efficiently and effectively. Things to take into account when organizing workflow include:

- How long each individual task should take
- Recognition of staff needs and award requirements such as breaks
- The number of people to best achieve a result or task
- Occupational health and safety requirements
- The most logical order of tasks to avoid duplication and gaps in service
- The suggestions of staff that are actually doing the job.

A useful tool for working out the appropriate workflow is a **flowchart**. A flowchart is particularly useful if the work process involves some decision points, as the flowchart shows the appropriate path to take at each point.

**Self-check 1****Written Test**

**Directions:** For the following questions, say TRUE if the statement is correct and FALSE if it is incorrect (wrong).

1. Prioritizing work is one of the essential elements of being a manager.
2. Workload is the amount of work an employee is required to do in a set period of time.
3. Workflow is not basically the order in which work is best done.

**Note: Satisfactory rating – 2 and above points**  
**points**

**Unsatisfactory - below 2**

**Answer Sheet**

**Score=**\_\_\_\_\_

**Rating:**\_\_\_\_\_



## Information sheet. 2 Scheduling work

### 2.1 Definition

**A plan** is typically any diagram or list of steps with details of timing and resources, used to achieve an objective to do something.

**A schedule** is a plan that gives a list of events or tasks and the times at which each one should happen or be done.

### 2.2 Deference between work plan and work schedule

**Work plan** includes:

- Outlining key project objectives,
- Identifying activities and tasks,
- Identifying needed resources,
- Creating project charter,
- Identifying project team structure,
- Drafting template, and other essential points.

Normally, it includes all things and arrangements that should be done in order to initiate, deploy, manage, execute and control the project, while **work schedule** is just a part of the main planning. It is time-specified project work plan that determines start dates, milestones and due dates of project tasks, activities and objectives.

Project work schedule is what follows and specifies the main project work plan, describing duration, table of events, project working days etc. The schedule cannot exist without project work plan. There are different software solutions that allow managing schedules in different formats.

### 2.3 Work schedule

A work schedule generally refers to the days per week and the hours per day that employees are expected to be at their job. For example, some jobs have work schedules that change, depending on the season. Make sure they know the work schedule for any job before accepting a position.



## **2.4 Check the Work Schedule before Accepting a Job**

The type of schedule required for a job is typically included in the job posting or explained during a job interview. However, if they're not clear about the hours, check with the employer prior to accepting a job offer. It's important to know if the work schedule will fit with your lifestyle and other responsibilities, like family or school. Even if a job is listed as full-time or part-time, you might want to follow up with questions about what your weekly schedule would look like. For example, one job seeker accepted a salaried job where she expected to work 40 hours per week, only to find out that the expectation was for 50. On the flip side, another applicant accepted a part-time job that he expected to be 25-30 hours a week. The employer scheduled him for 8-10 hours, and even less some weeks. You might also double-check the days each week that you are expected to work. For example, some jobs require you to come in on weekends, while others are only Monday through Friday.

## **2.5 Types of Work Schedules**

### **2.5.1 Full-Time Work Schedule:**

A full-time work schedule often requires a commitment of 37-40 hours per week. Because of the long hours, most jobs with full-time schedules are eligible for employee benefits. These benefits can include vacation and sick days, health insurance, and different retirement plan options. Full-time schedules vary from company to company, but most of the time, employees will work the same shift every week. The most common full-time work schedule is a variant of 9:00 AM to 5:00 PM, Monday through Friday, adding up to 40 hours per week. While most full-time work schedules are normally the same shift each day, in some cases (like retail), shifts can vary, but the number of hours will still add up to 35-40 per week. Full-time non-exempt workers generally receive overtime pay. This happens when the hours worked exceed the established 40-hour maximum. Overtime is paid at a minimum of base hourly pay plus a half of that base pay, also known as "time and a half." This is typical for people who get paid hourly. Exempt employees are not generally eligible for overtime. Most exempt employees receive a salary instead of an hourly rate.

### **2.5.2 Part-Time Work Schedule:**

A part-time work schedule is any schedule less than full-time employment. The benefit of this type of schedule is that it allows for greater flexibility to maintain other responsibilities outside of work.

Page 27 of 75	Federal TVET Agency Author/Copyright	TVET program :Edible Oil and Fats Processing Level – III	Version -1 March 2021
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Part-time work often does not include benefits offered to full-time employees, and hours can be erratic and inconsistent from week to week. An example of a part-time work schedule could be Monday through Wednesday from 7:00 AM to 11:00 AM and Saturday and Sunday 11:00 AM to 7:00 PM.

### **2.5.3 Fixed Work Schedule:**

A fixed work schedule is a timetable that generally consists of the same number of hours and days worked per week. Fixed work schedules tend to stay consistent once the number of hours and the days has been agreed upon by both the employer and the worker. An example of a fixed schedule would be Monday through Friday from 8:30 AM to 5:00 PM or Thursday through Sunday from 3:00 PM to 11:00 PM.

### **2.5.4 Flexible Work Schedule:**

A flexible work schedule is less rigid than a fixed schedule. Employees and employers work together to determine the number of hours and days of the week the employee will work. Depending on the employer's policy, employees may be expected to work a minimum

number of hours or be at work at a certain daily block of time, but shifts can often be switched with other coworkers in order to satisfy the needs of the employer and the busy life of the employee.

Flexible work schedules can vary infinitely, but an example might look like: Monday - 9:00 AM to 12:30 PM, Tuesday - 11:00 AM to 4:00 PM, Saturday and Sunday - 2:00 PM to close.

### **2.5.5 Rotating Shift Work Schedule:**

Rotating work schedules cycle employees through day, swing, and night shifts. This cycle helps to distribute different shifts between all employees so that no one is stuck with the less desirable hours every shift. This work schedule is not as common but can be seen in many careers like the military, construction work, roadwork jobs, power plants, and health care. These shifts can cycle weekly or quarterly, depending on the type of work required. For many employees, the transition between the different schedules can be tricky. Sleep and eating patterns change and the employee may see their family and friends less because of their rotating schedule.



This type of timetable does have some benefits. Employees are able to spend more time with family and friends during their normal work hours, and may be able to run errands they normally would not be able to complete. Hours can cycle between day shifts (7:00 AM to 3:00 PM), swing shifts (1:00 PM to 9:00 PM), and weekend, night, or overnight shifts.





**Self-check 2****Written Test**

**Directions: Match the following questions (2 point each)**

**A**

1. Planning of work
2. Fixed Work Schedule
3. Scheduling of work
4. Full-Time Work Schedule
5. Part-Time Work Schedule

**B**

- A.** any schedule less than full-time employment
- B.** decide when job shall be done by date/time
- C.** prepare everything needed to do the work
- D.** requires a commitment of 37-40 hours per week
- E.** time table that generally consists of the same number of hours and days worked per week

**Note: Satisfactory rating – 10 and**

**Unsatisfactory - below 10 points**

**Answer Sheet**

**Score=\_\_\_\_\_**

**Rating:\_\_\_\_\_**



## Information sheet 3 Delegating work

### 3.1. Introduction

Delegation occurs when someone with authority confers upon another person the power to do a particular task. Delegation is usually a one-way street - superiors delegate authority to subordinates.

### 3.2. Delegating tasks to staff that are part of their duties

The way that tackles the delegation of tasks to staff depends on the level of staff are supervising. Obviously the more responsibility a staff member has, the less likely you are to delegate specific tasks to them. You are more likely in this instance to agree on goals or objectives and the employee will then go about determining and prioritizing their own tasks. But, with less experienced or more junior or lower level positions, more direction is required on the part of the manager. Some points to consider when delegating tasks in this instance are:

- If appropriate, explain why the task has to be done, and why it has to be done in the way you are specifying – clear communication is critical
- Choose an appropriate time to inform the staff member about the delegation, and don't hurry the explanation
- Provide whatever instructions are necessary in the correct sequence, explaining all of the steps
- Provide training and demonstration, as required
- Continually check if the employee has any questions and encourage them to ask questions
- Continually check the staff member genuinely understands what is being said and shown to them
- Give them positive feedback – people operate better from a platform level of optimism and success, so make them positive and confident.

Essentially, staff must be treated with respect and it must be fair in the work you delegate by sharing it around amongst the entire staff and not appearing to victimize an individual or group. When delegating, you may run up against problems such as:

- Age differences
- Experience differences
- Gender issues



- The basics remain the constant – treat people with respect, explain requirements, solicit questions and answer them truthfully. Thank people for their cooperation. It is better sending time motivating and training staff, than just giving orders.

### **3.3. Delegating some of your own duties to staff**

There are real benefits in delegating some of your own work to other staff:

- It frees you up to do other things
- It gives staff experience at managerial type tasks, providing them with additional skills and potentially more interesting work
- It promotes a team approach by sharing tasks amongst everyone – it signals you have faith in their work, efforts and decisions
- It supports the career advancement of staff – wise staff will realize you have to be able to take orders before you can give them, and they will also regard delegation as an opportunity to show their worth to others. It also provides them with the opportunity to add new skills to their resume.

### **3.4. Principles of delegation**

By way of providing a summary of the above, the principles of delegation relate to:

- Knowledge of team strengths and weaknesses – who is good at what? Who wants to be challenged and extended? Who prefers just to do what they have always done?
- Knowledge of context-specific factors such as resource constraints, organizational goals, legal requirements and company policies and procedures
- Self- knowledge – about your ability to communicate and motivate staff, about how well you know the needs of the customers and the property, about how well you trust your staff.
- Evaluation – to determine how effective the delegation has been, if it should occur again and to learn the lessons contained in that delegation experience



<b>Self-check 3</b>	<b>Written Test</b>
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**Directions:** For the following questions, say true if the statement  
Is correct and false if it is incorrect (wrong).

1. Delegation is usually a one-way street (3.5 point).
2. Principles of delegation is not relate to knowledge of team strengths and weaknesses (3.5 point).
3. Giving staff experience at managerial type tasks is the benefits of delegating (3 point).

**Note: Satisfactory rating – 10 and above points    Unsatisfactory - below 10 points**

**Answer Sheet**

**Score=\_\_\_\_\_**

**Rating:\_\_\_\_\_**



## Information sheet .4     **Assessing workflow against agreed objectives and timelines**

### **4.1. Introduction**

Managers should assess the performance of staff against their agreed objectives and timelines. This should be done on an ongoing basis during work hours and also at scheduled times in terms of formal performance appraisals.

### **4.2. Assessing workflow and progress during work**

During assessing workflow and progress of work, consider the following three keys points:

- Walking around the venue to observe what is happening – this includes observation of staff practice and observation of customers. This could be body language, waiting times or listening for comments.
- Mentally matching what has been achieved against what is needed – many things in the industry have timelines attached to them
- Taking action to assist where indicators show the necessary work will not be completed on time, as required.

### **4.3. Staff appraisals**

In many organizations staff appraisals are an ongoing Standard Operating Procedure while in others they are undertaken only where there are indicators of problems. These should not be undertaken unless there were originally some definite objectives and timelines set for staff to achieve and unless these were agreed to. It is advisable to nominate, in advance, when this appraisal will take place so staff are well aware it is going to take place, they know it has been planned for and it will be treated and taken seriously.

Appraisals that “just happen” are not well regarded by staff, and are even less favorably considered by other managers. The fact that staff appraisals should have been mentioned at the staff interview and again during the Induction and orientation so workers know it is a standard part of working in the venue. When the set date and time for the appraisal are nearing it is worth reminding the staff member concerned. You should arrange a quiet and private space, free from interruptions and distractions for the appraisal. The meeting should be friendly and informal. It is an exchange and sharing of information, compared to a top-down event where managers “tell” staff.



You can expect the following to be covered:

- Overall feeling of personal performance
- Reasons why targets were or were not attained
- Relationships with other staff which appear to be beneficial or a hindrance
- Problems with equipment and process
- Timelines for work giving rise to problems
- Problems with patrons
- Resourcing issues.

Where a problem is identified by the staff member, your role is to collaboratively identify remedial action to be taken to resolve the issue. Solutions may include allocating more time, more resources, training, and job sharing, or mentoring. Often, staff comes to their own solutions when encouraged to talk things through. This meeting is also an opportunity for you as manager to share your views on how the worker is progressing. You may have information about:

- Compliments and complaints from patrons
- Compliments and complaints from other workers
- Instances – specific in nature, not vague generalizations. For example where you have observed noncompliance with procedures
- Specific examples of outstanding work performed.

The review also provides you with a great chance to talk one-on-one and share further information such as up-coming events, emerging issues, promotional opportunities, operational problems, and their attitude to delegation of work and so on.

The meeting should conclude by:

- Re-capping issues raised by both parties
- Setting targets and measurable objectives for the next period
- Identifying support or training required to achieve the set goals
- Setting a time and date for the next review.



Self-check 3	Written Test
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**Directions:** For the following questions, say true if the statement is correct and false if it is incorrect (wrong).

1. Walking around the venue to observe what is happening is not necessary during assessing workflow and progress work (3.5 point).
2. Managers should assess the performance of the staff (3.5 point).
3. Timelines for work giving rise to problems (3 point).

**Note:** Satisfactory rating – 10 and Unsatisfactory - below 10 points

**Answer Sheet**

**Score=**\_\_\_\_\_

**Rating:**\_\_\_\_\_



## Information sheet .5 Assisting colleagues in prioritization of workload

### 5.1. Introduction

Times will arise when there is a need for you to assist staff members in the prioritization of their workload. Critical elements in providing this sort of help are the use of feedback and coaching.

### 5.2. Feedback

Feedback may be seen as the on-going verbal and non-verbal support provided to staff as they seek answers to the perpetual question “How am I going?” Verbal responses include answers to both asked and implied questions with statements such as “Looks like you’ve got the hang of that pretty well”, “Well done”, “Looking good”, “Good job”. Non-verbal responses can include a smile or grin, a nod, a silent hand clap, a physical pat on the back, the thumbs up sign or making a circle with the thumb and the forefinger. Managers realize it is feedback that turns a monologue into a dialogue. Without feedback staff may as well be talking to themselves.

Naturally where negative feedback needs to be done, it should be communicated in a sensitive and empathetic fashion, usually in private. Any negative feedback must concentrate wholly on actions and not blur into including the personality of the staff member concerned. It is important to just stick to the demonstrated facts. Negative feedback is best delivered using a technique called the “Positive-Negative-Positive” sandwich. This means you say something positive about the staff member’s performance, deliver the negative feedback and close again on a positive note.

### 5.3. Coaching

Coaching can be seen as a process of providing information, including feedback, to an employee. The purpose of coaching is to reinforce and extend knowledge and skills developed through other training. The principles of coaching are:

- Involvement
- Understanding
- Listening





#### 5.4. Changing the situation

The manager may change:

- Their behavior patterns or style of leadership, to better suit the employee under consideration. Some staff prefer a democratic leader, and many prefer the definitiveness of an autocrat
- The conditions of the work situation – altering the workplace so it is more conducive to work by making it safer, making it less noisy or smoky, adjusting the lighting, air conditioning, introducing security staff.

#### 5.5. Advising management on staffing needs

Managers will, from time-to-time, be required to provide input to others in relation to various establishment needs, plans and policies. Because labor is such a large budget figure, staffing requirements is a constant area where operational managers are called on to provide information to higher level management. An important part of your role as manager is to make sure the staff who report to you are engaged in interesting and meaningful work, they are fully occupied but not overloaded, and they have clear tasks to perform. In doing the work of a manager you will find you have more cooperation and interest from staff if you involve them and consider their suggestions for change or improvement. As the manager of your team, you are in the best position to monitor staff needs and, where possible to meet these within the goals of your organization. Senior management of your organization will assume you are coping with the staff and resources you have unless you advise them differently. Part of your role is to keep management informed of progress against goals and to advise them of any difficulties you are having with staff, patrons, equipment, suppliers, or authorities. In addition discussions may focus on any needs you are unable to meet including targets, budgets or deadlines.

At times you will find you are not always able to ensure there is a smooth and trouble-free workflow from your unit or department. There can be many reasons for this and it is usual your employer will be aware of them. Very few, if any, employers expect relatively new and young managers to run their department or unit without any problems. The vast majority are very understanding and more than willing to help where required and when asked.



<b>Self-check 5</b>	<b>Written Test</b>
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**Directions:** For the following questions, say true if the statement is correct and false if it is incorrect (wrong).

1. To assist staff members, feedback and coaching are critical elements(3.5 point).
2. Coaching can be seen as a process of providing information(3.5 point).
3. Involvement, understanding and listening are principles of coaching(3point).

**Note:** Satisfactory rating – 10 and above points      Unsatisfactory - below 10 points

**Answer Sheet**

**Score=**\_\_\_\_\_

**Rating:**\_\_\_\_\_



## Information sheet 6 providing input of appropriate management regarding staffing needs

### 6.1 Staffing

Staff, or personnel, planning are one of the most common activities conducted by HR (Human Resource) departments. It typically is comprised of using the current staff size and design to predict staffing levels for the upcoming year. HR departments may utilize a company's strategic plan as a resource for information. For example, if an organization intends to launch a new interactive website in the following year, the HR department will budget for additional staff to build and maintain the website.

### 6.2 Develop a Staffing Plan

The first thing you need to do is to develop a staffing plan. Think of it as a map that outlines the exact number of positions and roles within your organization as well as the skills and qualifications required for each role. This document should cover your current and future staffing needs in accordance with your budget and goals. A small business staffing plan may include the following:

- The number and types of employees needed to run the business efficiently.
- Existing staffing resources.
- Staffing projections.
- Gaps in your workforce.
- Staffing options (such as permanent vs. temporary employees).

There are various ways to create a staffing plan. For example, you may include your short- and long-term goals, the tasks needed to achieve those goals and who will be responsible for each task. Even if you're fully staffed, your employees may lack certain skills needed for upcoming projects. Therefore, it's important to look at the big picture and develop staffing projections for the next few months or years. With a staffing plan in place, you'll have a better understanding of your company's current and future needs. At the same time, you'll be able to make better hiring decisions and reduce your turnover rates. Furthermore, you can use a staffing plan to determine whether you need to bring in full-time, part-time or temporary workers. Update this plan as your needs change.



### 6.3 Assess and Determine Staffing Needs

As a small business owner or startup founder, you may have a hard time figuring out your staffing needs.

Being short staffed can keep your business from growing and make it difficult to handle the workload. Having too many employees, on the other hand, can drive up your costs and become a financial burden.

#### 6.3.1. How to Determine Staffing Needs

Assess existing staffing needs resources and seek ways to maximize them. Use staffing forecasting methods to predict your company's future needs and identify any gaps when hiring new employees. A brick-and-mortar store, for example, can determine future staffing requirements based on the sales volume per employee over the past few years. Check each department in your organization and try to figure out where gaps exist and take the following measures:

- As you see, there are several factors you need to consider when creating a staffing plan. Look at your business plan and existing HR resources. Create a current skills inventory and talk to your staff members about what other skills and abilities they may have. Check past performance reviews as well.
- Next, evaluate your options. Will your company need to hire more people? Is there any way to improve employees' productivity or help them develop the skills they already have? Do you need new employees in-house or on a project/contract basis?
- Check your regular turnover and retirement turnover rates. For example, if you know that several key employees will retire over the next two years, plan your staffing needs and budget accordingly. Consider hiring and training interns to cut costs. By the time your current employees will retire, interns will have acquired the skills and experience needed to replace them.

### 6.4 The Importance of Strategic Staffing

Your employees are your greatest asset. A strategic staffing plan can increase your chances of finding the right people for the job and reduce your hiring costs. Additionally, it can make your business more productive and maintain harmony in the organization. Both under- and over-staffing can result in workplace conflicts, diminished productivity and revenue loss.

Page 41 of 75	Federal TVET Agency Author/Copyright	TVET program :Edible Oil and Fats Processing Level – III	Version -1 March 2021
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Training and development HR departments create training and employee development plans as well. This type of planning must be conducted in advance of the company's needs in order to prepare for them, both from financial and resource perspectives. Training for new employees and product rollouts may be included. Teaching current employees new skills is considered an aspect of development. Organizations benefit from having streamlined and consistent training programs.

### **6.5 Career Development**

Career development is imperative in order to prepare an organization for upcoming retirements, as well as to retain long-term employees. Companies need to have a strategic plan on how they intend to replace their management with qualified leaders. This means that current employees should have career road maps and plans that incorporate both short-term and long-term goals. For example, if an organization is grooming a top, young salesperson for the management track in five years, training should begin now. This may include time management courses, classes on how to coach others and a mentor program.



<b>Self-check 6</b>	<b>Written Test</b>
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**Directions:** For the following questions, say true if the statement is correct and false if it is incorrect (wrong).

1. Developing a staffing plan is the duty of an operator.
2. HR departments create training & employee development plans as well.
3. A small business staffing includes existing staffing resources.

**Note: Satisfactory rating – 2 and above points**  
**points**

**Unsatisfactory - below 2**

**Score=\_\_\_\_\_**

**Rating:\_\_\_\_\_**

**LG #11****LO #3- Maintain workplace records****Instruction sheet**

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Completing and submitting workplace records within required timeframes
- Delegating and monitoring appropriate completion of records prior to submission

This guide will also assist you to attain the learning outcomes stated in the cover page.

Specifically, upon completion of this learning guide, you will be able to:

- Complete and submit workplace records within required timeframes
- Delegate and monitor appropriate completion of records prior to submission

**Learning Instructions:**

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks



## Information sheet-1 Completing and submitting workplace records within required timeframes

### 1.1. Introduction

Workplace records are an important part of any work environment and should be accurately maintained within the required timeframes. Reporting is an indispensable part of all management functions and provides the key input to performance evaluation. Technical personnel of the oil industrial system shall understand the value of the records and keep the forms filled and in their routine operation activity and make the reporting process realized. Such record reports allow management to measure performance and compare actual performance with standards and targets. The results may indicate that corrective action is required to obtain conformity with the plan.

### 1.2. Record keeping routine operations/maintenance procedures

This section provides a description of the routine operation and maintenance (O&M) procedures designed to maximize operating techniques and preventative maintenance to ensure proper operation of the system.

### 1.3. Types of workplace records monitored by managers.

- **Staff records** :- These are records relating to any and all aspects of staffing the premises and may be divided into
  - ✓ Overall records and
  - ✓ individual staff records

Overall records: Overall records are those records kept that relate to staff as a whole and gain an overview of what is happening with staff movements and training.

Examples of overall records are:-

- ✚ Staffing rosters
- ✚ Training details by operational area
- ✚ Annual leave planning chart
- ✚ Salary and overtime payments
- ✚ Injury records.





Examples of Individual records are:-

- + Position description
- + Letter of appointment
- + Signed employment contract or offer of employment
- + Performance review records
- + Copies of certificates held by the employee
- + Leave records
- + Record of uniform orders
- + Training schedule
- + Direct salary deduction details
- + Injury claims.

**Ensure you:-**

- + Understand which records you are responsible for complete required records
- + Maintain confidentiality and privacy of information
- + Records are kept up-to-date Make records easily accessible.

#### **1.4. Reporting defects**

Edible oil processing system operator should report defects immediately:

- If a defect is considered to be a hazard to safety, machine system operations should be stopped until the defect is repaired.
- The details of reported defects and subsequent action taken should be entered into a log book.



<b>Self-check 1</b>	<b>Written test</b>
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Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Directions:** Write true if the statement is correct and write false if the statement is wrong. (5pts. Each)

1. Workplace records are an important part of any work environment.
2. Overall records are those records kept that relate to staff as a whole.

**Note:** Satisfactory rating – 2 and above points , Unsatisfactory - below 2 points

### Answer Sheet

**Score =** \_\_\_\_\_

**Rating:** \_\_\_\_\_



## **Information sheet - 2 delegating and monitoring appropriate completion of records prior to submission**

### **2.1. Introduction**

In some cases there can be a need for you to delegate the completion of workplace records to other staff. Where this need arises, the earlier notes on delegation must be implemented, and you have an obligation to monitor the performance of others in completing these records.

### **2.2. Complete records prior to submission and Log books**

Instruction, maintenance and repair manuals should be kept in a safe place at the registered premises, and should include a parts catalogue. The operator should be familiar with the contents of the instruction manual which should be available at the site of operation. All log books and inspection record sheets must show complete details of all inspections, tests, repairs, replacements and modifications carried out on equipment, and be available for inspection by the principal contractor or person in control of the workplace.

### **2.3. Delegating preparation of records**

In some cases there can be a need for you to delegate the completion of workplace records to other staff. The manager of a work area is unlikely to personally attend to all of the records in their work area. A manager must be prepared to delegate such tasks and have a system for regularly monitoring such records. The delegation addressed accountability and responsibility for the accuracy of workplace records.

### **2.4. Types of records**

Staff may be given required to complete records such as:

- Time sheets
- Requisitions
- Internal transfers
- Requests for maintenance
- Daily takings sheets. .



## **2.5. Steps to delegating records**

Delegating authority and responsibility for completion of such records involves:

- Finding the appropriate person to do the job
- Making sure the person is capable or trained to take on the task
- Ensuring confidentiality is maintained at all times
- Training the person in the tasks required
- Monitoring the process on a regular basis.

## **2.6. Monitor completion of records**

Monitoring may include:

- Regular visual inspection and checking of records
- Signing the records to authorize them or indicate they have been checked and approved
- Comparing the records kept with actual workplace occurrence.



Self-check 2	True/false
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Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Directions:** Write true if the statement is correct and write false if the statement is wrong. (5pts. Each)

1. All log books and inspection record sheets must show complete details of all Activities.
2. Delegation addressed accountability and responsibility for the accuracy of workplace records.
3. Finding the appropriate person to do the job is not address delegating.

**Note:** Satisfactory rating – 2 and above points , Unsatisfactory - below 2 points

**Answer Sheet**

**Score =** \_\_\_\_\_

**Rating:** \_\_\_\_\_



## LG #12

## LO #4- Solve problems and make decisions

### Instruction sheet

This learning guide is developed to provide you the necessary information regarding the following content coverage and topics:

- Identifying and considering workplace problems
- Initiating short term actions of resolving immediate problem
- Analyzing problems long term impact
- Assessing potential solutions of consultation with relevant colleagues
- Encouraging participation of team members solving of raised problem
- Taking follow up action of monitoring effectiveness of solutions in the workplace

This guide will also assist you to attain the learning outcomes stated in the cover page.

Specifically, upon completion of this learning guide, you will be able to:

- Identify and consider workplace problems
- Initiate short term actions of resolving immediate problem
- Analyze problems long term impact
- Assess potential solutions of consultation with relevant colleagues
- Encourage participation of team members solving of raised problem
- Take follow up action of monitoring effectiveness of solutions in the workplace

### Learning Instructions:

1. Read the specific objectives of this Learning Guide.
2. Follow the instructions described below.
3. Read the information written in the information Sheets
4. Accomplish the Self-checks



## Information sheet-1 Identifying and considering workplace problems

### 1.1. Introduction

Problem solving and decision making are two key tasks of any manager. The ability to deal quickly and effectively with workplace problems are standard ongoing requirements for any manager and will be a significant indicator of your effectiveness.

### 1.2. Identifying and considering workplace problems

Work place problems can be identified by:

- Looking at the facts
- Talking with people and listening to their views
- Walking around the premises and observing
- Isolating some factors.
- Consider other contributing problems

Sometimes a real problem can be 'hidden' behind a less serious issue. You have to be sure you are treating the cause and not the symptom. Work place problems can be exhibited (displayed) by:-

- Complaints
- Poor staff performance
- Failing equipment
- Orders not being processed as required, within set timelines
- Stress
- Staff absenteeism
- Decreases in takings and support

#### 1.2.1. Nature of the problem

- They are often unexpected.
- They seem to come at the worst of times, such as when you are busy and short staffed dealing with another problem.



### 1.3. Handling problems

A great consideration has a vital role when we have handling problems. A solution to a problem has the best chance of succeeding if:

- It is made early on when the problem first surfaces
- It includes those who are directly involved
- Reasons for the decision are explained to those who are not directly involved
- It is clear and unambiguous
- It is in-line with stated organizational goals
- It aligns with organizational policies, vision and values
- All the implications of the decision have been thought through

### 1.4. Solving workplace problems

Problem solving and decision making are two key tasks of any manager. The ability to deal quickly and effectively with workplace problems are standard ongoing requirements for any manager. It will be a significant indicator of their effectiveness.

#### 1.4.1. Making a decision ;Factors to consider when making a decision are:

- Who will be involved in the decision making process
- How acceptable the decision is to all relevant parties
- The impact of the decision
- The cost of the decision
- The resources to implement it
- Whether your decision is likely to fix the real problem or just cover it up.
- It is important to convey to all relevant parties
- It is important to convey to all relevant parties:
- The actual decision
- An explanation of the reason for the decision
- In verbal and written format

Reviewing the decision and making adjustments as necessary.

- ✓ It is important to build in a review process.
- ✓ This involves checking to see if there has been an improvement to the original problem.
- ✓ If not, you might have to look at another option.





#### **1.4.2. Step in problem solving; considering options are:-**

- Identify your desired outcomes
- Consider outcomes from an operational and a customer service perspective.
- Look at what alternative options have for solving the problem

#### **1.4.3. Problem solving guidelines;**

- Look at each situation carefully
- Considering its specific circumstances
- Never rush into a decision
- Don't be pressured into making a rushed decision
- Think of the implications of any decisions.

##### **1.4.3.1. Additional considerations for problem solving:**

- Make sure you are authorized to make the decision.
- Ask yourself as objectively as possible, whether the decision is fair and justifiable?
- Check whether the decision fits with organizational objectives and mission
- Remember, there is often more than one acceptable solution to a problem
- Spend time looking for second and third alternatives.



<b>Self- Check 1</b>	<b>Written Test</b>
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**Direction I: Multiple choice questions**

**Instruction:** Choice the best answer from the given alternatives and write your answer on the answer sheet provided in the next page (2 points each)

1. Work place problems can be identified by:
  - A. Complaints
  - B. Poor staff performance
  - C. Looking at the facts
  - D. Failing equipment
  
2. One of the following is not the factor to consider when making a decision:
  - A. The impact of the decision
  - B. Looking at the facts
  - C. The resources to implement
  - D. The cost of the decision
  
3. One of the following can be Problem solving guideline.
  - A. Look at each situation carefully
  - B. Considering its specific circumstances
  - C. Never rush into a decision
  - D. All of the above

**Note: Satisfactory rating – 2 and above points , Unsatisfactory - below 2 points**

**Answer Sheet**

**Score =** \_\_\_\_\_

**Rating:** \_\_\_\_\_



## Information sheet 2 Initiating short term actions of resolving immediate problem

### 2.1 Introduction

Actions taken within an operation workplace context can be seen as either short term action or long term action. Where service is paramount, such as in the hospitality industry, it is sometimes necessary to take short term action to solve a problem until it can be looked at more closely and the problem dealt with more thoroughly.

### 2.2 Reasons for short-term action

Reasons for short-term action include:

- Pressure of work often means there just isn't time to stop and analyze the problem more carefully and in more detail
- To provide the necessary or expected services to the customer
- To meet OHS requirements
- To deal with a complaint
- To get staff working together again
- To give you time to analyze and work through the problem at a later date.

Usually these stop-gap measures are not satisfactory in the long term as they are often more costly and they do not prevent the problem from recurring. As the manager of an area, it is important you consciously decide when to take short term action and when this would be inappropriate. If you decide to take the short term approach, then it is a good idea to:

- Make a definite time to look at it more thoroughly later on and to decide who to involve in further problem solving
- Inform staff and management it is a short term solution which will be dealt with more thoroughly at a specified time
- Cost the implications of tackling the problem this way.



### **2.3 Identify environmental factors that may contribute to the problem/goal.**

How do the environmental factors contribute to the problem or goal within your community?

- a. Support and services
  - i. Availability and continuity of social support and ties
  - ii. Availability of appropriate services
  - iii. Availability of resources
- b. Access, barriers, and opportunities
  - i. Physical access and barriers
  - ii. Communication access and barriers
  - iii. Competing requirements for participation
- c. Consequences of efforts
  - i. Social approval and disapproval
  - ii. Incentives and disincentives
  - iii. Time costs and delays



<b>Self- Check 2</b>	<b>Written Test</b>
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**Direction I: Multiple choice questions**

**Instruction:** Choice the best answer from the given alternatives and write your answer on the answer sheet provided in the next page (2 points each)

1. One of the following is an environmental factor to contribute problem up on your community.
  - A. Support and services
  - B. Access, barriers, and opportunities
  - C. Consequences of efforts
  - D. All of the above
  
2. One of the following is not the reasons for short-term action:
  - A. To meet OHS requirements
  - B. To deal with a complaint
  - C. To get staff working together again
  - D. None of the above
  
3. One of the following can be a good idea for short term approach:
  - A. Inform staff and management
  - B. Cost the implications of tackling the problem
  - C. Make a definite time to look at it more
  - D. All of the above

**Note: Satisfactory rating – 2 and above points, Unsatisfactory - below 2 points**

**Answer Sheet**

**Score =** \_\_\_\_\_

**Rating:** \_\_\_\_\_



### Information Sheet- 3 analyzing problems long term impact

#### 3.1 Need for long-term action

Employers expect managers to analyze problems for any long-term impact so appropriate solutions can be devised. Involvement of staff and other managers in the consideration is regarded as optimizing the effectiveness of solutions generated. Whilst short term action is useful, or essential, for getting through the day-to-day activities of an organization, managers must take also responsibility for long term planning especially where there are regular repeated instances of „emergencies“ or situations cropping up. If a situation is a one-off event, then the need for long term planning is non-existent, but where something happens again and again, it is worthy of consideration the following points:

- How often is regular?
- When does something fall into the category of requiring long term planning?
- In the majority of cases it will become obvious, because:
  - The situation is causing problems for staff and for customers
  - Staff or customers are becoming annoyed or upset by it
  - It is adversely affecting staff performance and customer service levels
  - It is costing the company money
  - It is involving and negatively impacting on a lot of people
  - It is presenting an obvious risk of some sort
  - It is breaching legislation, company policies and organizational values.

#### 3.2 Analyzing Problems and Goals

**Priority** justification of the **problem or goal Include:**

- a. How often does the problem occur (or is the goal attained)?
- b. How many people are affected?
- c. For what amount of time are they affected?
- d. How severe (significant) is the effect?



- e. How important is the problem or goal perceived to be by others?
- f. How effective are efforts to address it likely to be?

**3.3 Frame the problem or goal to be addressed. State as:**

- a. Lack of/too few of a positive condition
- b. Presence of/too much of a negative condition
- c. Both (if different stakeholders seem to respond to different framing)

**3.4 Review the naming and framing of the problem or goal.**

- a. Does the statement of the issue focus on the condition or outcome of interest?
- b. Does it avoid defining the problem in terms of a preferred solution?
- c. Is the problem or goal framed in a way to build consensus?

**3.5 Ask questions about the problem or goal to identify key behaviors, actors, and consequences.**

- a. What behaviors (of whom) contribute to the problem or goal? (Who is doing -- or not doing -- things that contribute to the problem or goal?)
- b. Who is affected by the problem or goal?
- c. How are people affected by the problem or goal?
- d. When and where did the condition or problem behavior first occur, or when did it become significant?

**3.6 Analyze "root" causes of the problem to identify the environmental conditions and related behaviors that might contribute to the problem or goal.**

- a. State the issue or
- b. Ask "But, why?"
- c. For each answer given, repeat the question, "But, why?"
- d. Based on the answers to the "But, why?" questions, identify environmental conditions and related behaviors that need to change.



- e. Based on the analysis, identify promising interventions that might contribute to improvement.

### **3.7 Identify restraining and driving forces that affect the problem or goal.**

- a. What forces are keeping the situation the same?
- b. What forces are causing it to change?
- c. Indicate how this analysis influences how we would address the problem or goal.





Self-check 3	True/false
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Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Directions:** Write TRUE if the statement is correct and write FALSE if the statement is wrong. (5pts. Each)

- 1) Employers expect managers to analyze problems for any long-term impact.
- 2) If a situation is a one-off event, then the need for long term planning is non-existent.
- 3) How many people are affected? **This question** justifies the **priority** of the **problem or goal**.

**Note:** Satisfactory rating – 2 and above points , Unsatisfactory - below 2 points

**Answer Sheet**

Score = \_\_\_\_\_

Rating: \_\_\_\_\_



## Information sheet 4 Assessing potential solutions of consultation with relevant colleagues

### 4.1 Six Tips to Assess Problems, Find Solutions

There's an old joke that a consultant is someone who listens to the employees, tells management what they are saying and takes a fee for it. This is truer than most consultants would like to admit. If you want to solve a problem without paying a big consulting fee, learn to do three things:

- Listen to yourself
- Listen to your team
- Do what makes sense

Yes, it's really that simple--90 percent of advanced tools like process reengineering, project management and quality management are just common sense. My mom once asked me what I did for a living. When I explained it to her, she said, "but that's just common sense." I replied, "It's because you call it common sense that I'm so good at it." Good old mom! The Common Sense Approach

- **Fix what you can, instead of blaming others.**

Sure the economy sucks, suppliers mess up, and customers are a royal pain. That is as true for your competitors as it is for you. What makes winners different is what we do about the problems we can solve, and how we inspire our team to take a can-do attitude and do good work.

- **Fix the right problem.**

Think like a doctor. You wouldn't be happy if your doctor gave you stomach medicine for a heart condition. In business, though, we often fix the wrong problem. For example, when sales are low, we push the salespeople. Most likely, they're already doing a good job, and the problem is in marketing.



Remember: The cause of a problem is almost never where the symptom shows up. Find the cause and fix it; you can't fix a symptom.

**If the problem comes back, find out why, and fix it.** Say you have some defective parts in your products. Getting rid of them isn't enough. How do you know more defects won't arrive with the next order? Instead:

- Check with your supplier: How can they confirm that there will be no future defects?
- Change your contract: Add a penalty for defective parts.
- Change the way you choose suppliers: Go for quality, and prevent the problem.

Now that you know how to fix problems, you just need to find the problems that need fixing.

#### **4.2. Find problems by complaining.**

There's your list of problems. Now start solving them. Which problem do you solve first? It doesn't matter. If you have time and energy, fix the one that will be the biggest boost to your bottom line. If you're running around like a chicken with your head cut off, then fix the one that is bugging you the most.



Self-check 4	True/false
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Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Directions:** Write true if the statement is correct and write false if the statement is wrong. (5pts. Each)

1. To solve your problem without consultant, you have to listen to yourself.
2. Fix what you can, instead of blaming others is not good approach to solve problems.
3. The purpose of a business should be to do what we love.

**Note:** Satisfactory rating – 2 and above points, Unsatisfactory - below 2 points

**Answer Sheet**

**Score =** \_\_\_\_\_

**Rating:** \_\_\_\_\_



## **Information sheet -5 Encouraging participation of team members solving of raised problem**

### **5.1. Introduction**

While managers should encourage and motivate staff to solve their own problems and take responsibility for implementing them, there will always be times when they come to you with a problem. An effective response to these situations is to continue the theme of involvement and actively engage staff in helping to identify a solution.

### **5.2. Dealing with problems raised by a team member**

Throughout working week, problems brought to by staff will cover a range of issues. One way to deal with problems raised by a team member is to make a decision and “solve” the problem yourself. This is often necessary if:

- The problem involves calling in others staff
- Things are flat out and you need to make a decision to keep things moving
- Staff do not have the authority or the ability to solve it themselves
- Where the matter involves matters of confidentiality, security or health and safety.

However, where possible it is advisable to get the staff member involved in solving the problem themselves, with your support. When you solve problems by yourself, your technique of facilitate includes:

- Asking them to fully describe the details of the situation
- Asking them what they have already done to try to resolve the situation
- Asking them why they believe their actions to-date have not been successful
- Asking them what they think the next step should be and why that is the case
- Contributing ideas to extend and support their ideas and suggestions
- Encouraging them to think of more alternatives
- Encouraging them to implement an identified possible solution.



<b>Self-check 5</b>	<b>True/false</b>
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**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Directions:** Write TRUE if the statement is correct and write FALSE if the statement is wrong. (5pts. Each)

1. Your staff members have their role in solving problems with your support.
2. Encouraging your staff members is used to think of more alternatives.
3. Don't deal with problems raised by a team member.

**Note:** Satisfactory rating – 2 and above points , Unsatisfactory - below 2 points

**Answer Sheet**

**Score =** \_\_\_\_\_

**Rating:** \_\_\_\_\_



## **Information sheet- 6 Taking follow up action of monitoring effectiveness of solutions in the workplace**

### **6.1 Introduction**

Whatever solutions are arrived at, whatever resolutions are made in the workplace, it is essential to track the progress of those decisions to monitor their outcome and their effectiveness. While it is expected decisions and actions will fix problems the reality is this is not always the case and managers are expected to follow-up to ensure the workplace operates as effectively and efficiently as possible.

### **6.2 Timing**

Usually a time for monitoring or reviewing progress is made at the same time the decision is taken. This time and date is diarized electronic or paper-based diary with a meeting sometimes held with relevant stake holders? This meeting simply seeks to determine whether or not the recommended action has been implemented is working as anticipated. Sometimes the need for follow up action is notified by computer which flags when a certain item requires attention. Time can occur when a pre-specified level is met. This level may be:

- A certain number,
- A set percentage,
- A nominated amount of sales,
- A given dollar amount or percentage over or below budget.

The computer may also generate a report or create some form of warning to notify you attention is required. The meeting should not be seen as a witch hunt, or as an opportunity to start laying the blame at anyone's feet if things are not progressing smoothly. Managers should note the need for follow up action can be delegated to someone else. Where the review shows things are on track, and proceeding as expected, you may well decide to feed this positive information back to those who helped make the decision. It is always useful to be able to pass on some good news wherever possible.



<b>Self-check 6</b>	<b>Written taste</b>
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Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Directions:** Write TRUE if the statement is correct and write FALSE if the statement is wrong. (5pts. Each)

1. It is always useful to be able to pass on some good news wherever possible.
2. It not is essential to track the progress of the decisions.
3. Sometimes the need for follow up action is notified by computer.

**Note:** Satisfactory rating – 2 and above points , Unsatisfactory - below 2 points

**Answer Sheet**

**Score =** \_\_\_\_\_

**Rating:** \_\_\_\_\_





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## **AKNOWLEDGEMENT**

We would like to express our appreciation to the TVET instructors and experts of regional TVET bureau, TVET College, and Federal Technical and Vocational Education and Training Agency (FTVETA) who made the development of this learning module with required standards and quality possible.

We wish thanks and appreciation to the representatives of BEAR II UNESCO PROJECT who covers the financial expenses, sacrificing their time and commitments to develop this learning module.



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