NATURAL RESOURCES CONSERVATION AND DEVELOPMENT

LEVEL III

Based on March, 2018, Version 3 Occupational standards

Module Title: - Monitoring Implementation of Work Plan/Activities

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LG #105	LO# 1- Monitor and improve workplace operations.

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 on an ongoing basis. • Supporting operations of overall enterprise goals and quality assurance • Identifying promptly quality problems and issues • Changing procedures and systems to improve efficiency and effectiveness. • Consulting colleagues improve 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: • Undertake monitoring efficiency and service levels on an ongoing basis. • Conduct how to Support operations of overall enterprise goals and quality assurance • Apply how to Identify promptly quality problems and issues • Undertake how to change procedures and systems to improve efficiency and effectiveness. • Perform how to consult colleagues improve 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". Try to understand what are being discussed. Ask your trainer for assistance if you have hard time understanding them. 4. Accomplish the "Self-checks" which are placed following all information sheets. 5. Ask from your trainer the key to correction (key answers) or you can request your trainer to correct your work. (You are to get the key answer only after you finished answering the Self-checks).

1.1. Introduction

What is Monitoring?

Monitoring is the regular observation and recording of activities taking place in an organization. It is a process of routinely gathering information on all aspects of the organization.

Monitoring is a process of determining how well our plans are being implemented. You cannot monitor something if you do not have a plan or basic structure of how something should be done, or a defined goal or target.

To monitor is to check on how organization activities are progressing. It is observation; systematic and purposeful observation.

Reporting enables the gathered information to be used in making decisions for improving organization performance.

1.2. Basic definition and concept

Workplace: - is a location where someone works for his or her employer, a place of employment.

Operation: - is the work of managing the inner workings of your business

Work operations refer to the work itself and includes systems and procedures, staff performance, and levels of service in the workplace

Organization: - place where groups of people work together to achieve a common goal, or goals.

Manager: - is the person who deals with unexpected problems or issues and decides the most appropriate course of action to take.

Efficient – work done on time and within the given resource constraints

Effective– the service or product meets quality standards and the job is done

1.3. Monitoring work operation

The process of monitoring work operations is:

- Planning and preparing – goal-setting and deciding how to achieve those goals
- Organizing – allocating and arranging for the planned tasks to be done
- Staffing – organizing enough staff and the correct staff to carry out the tasks

Monitoring operations requires management oversight, employee feedback and customer reviews. It can help provide specific directions for employees, which can lead to improved time management and increased productivity.

Improving workplace operations requires analyzing collected data to identify the underlying problems and to find resolutions and methods to deal with them.
Continually monitoring and looking for ways to improve workplace operations can help an organization stay on financial track and keep delivering top quality products and services. You need to monitor workplace operations so you can develop strategies to improve procedures and protocols.
These operations can include:

- Service delivery – ensuring staff provide the level of service established or 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 rooms, drinks, food and entertainment we supply
- Dealing with paperwork – 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.

1.4. Overview of management responsibilities

It is common that a worker has both management and operational responsibilities and to be part of a work team.
Managers are often responsible for staff who have multiple tasks and who move between jobs and tasks. Content-free managers are common. That is, they have not necessarily been trained in, or worked directly in, the department or area they are managing.
Most staffs are directly or indirectly involved in setting goals for the organization and working out ways to best achieve them.
A manager is responsible for coordinating the work people do to achieve specific goals. Because most organizations aim to make profits and meet customer expectations, managers are also required to make sure the work is done efficiently and effectively
A manager is also the person who deals with unexpected problems or issues and decides the most appropriate course of action to take.
Typically, a manager has four functions:

- Planning – setting goals and targets, overseeing the development of plans, systems and processes for achieving goals, working out how best to get there within a budget

* Organizing – coordinating the resources, staff, plant and facilities to achieve goals
* Leading – providing the direction, support, encouragement, feedback and training staff need to do their job well
* Monitoring – supervising staff, and monitoring and adjusting systems and procedures to make sure goals are achieved as planned.

Managers will work differently depending on a number of factors. Depending on management tasks and level of responsibility in the organization**,** managers are categorized into

* Chief executive officers
* Middle level
* direct supervisor

1. Chief executive officer

They are more reliant on conceptual skills.

For example, a chief executive officer (CEO) is likely to be more involved in:

* Dealing with the board of management
* Broad organizational planning
* Positioning the enterprise in the marketplace
* Securing large contracts for the business
* Balancing the finances of the organization
* Leading the enterprise as a whole.

2. Middle level manager

They are likely to need strong planning and interpersonal skills

The middle level manager is more concerned with:

* Operational planning
* Establishing staffing levels within given budgets
* Dealing with unresolved problems
* Setting up systems and procedures
* Supervising sales and contracts
* Encouraging staff and setting up systems to support them.

3. Supervisor

They are required to understand the technical details of how the operation is working, and they also need to have strong interpersonal skills.

The supervisor or line manager – is more likely to:

* Work directly with staff on a day-to-day basis

- Monitor their workload and workflow
- Handle queries and issues as they arise
- Verify systems are implemented and suggest changes if they are not working.

Their role and responsibilities depend on the size and type of the organization they work in

- In large organizations,
  - ✓ Roles and responsibilities are more likely to be defined and separated,
  - ✓ Managers will work in specific teams or units.
- In a smaller enterprise,
  - ✓ Managers required to work across a number of areas (for example, in sales and marketing and distribution).

The culture of the enterprise

All organizations have a culture or a mind-set or a particular way of operating. The culture of a business is often described as "the way we do things around here".

The culture could be:

- Supportive of staff
- Customer-oriented
- Friendly
- Comfortable
- Casual
- Total quality management in focus/nature
- Blaming
- Negative
- Stressful
- Or any combination of the above.

Their preferred style of operation

Managers are people with different personalities. They feel comfortable working in a way that reflects their personal style. This is not to say that managers cannot and should not learn, but it is an acknowledgment that management should know their strengths and build on these. They should also know their shortfalls and work towards improving these.

Their management style could be:

- Laissez faire
- Team-oriented
- Task-oriented

- Autocratic
- Outgoing
- and many more

1.5. Monitoring efficiency and service levels

What is Productivity?

It is a result of measuring someone's efficiency to do work against time. It can be used in different terms such as employee's productivity, company's productivity, etc.

Service level measures the performance of a system. Certain goals are defined and the service level gives the percentage to which those goals should be achieved

1.5.1. Measurement of Employee Productivity:

The following methods are one of the best when it comes to the accountability factor on behalf of any number of employees.

1. . Establish a Baseline

The first and most important thing to do before measuring employees' productivity is to set some standards for every position that what is the expected output for this task.

We can also put it this way that a set target should be given for specific tasks.

This way, the employees will know what is expected of them and will provide more clarity for both employers and employees.

2. Define and Measure Tasks (Not Hours)

Explain the set measurements or targets regarding specific tasks to the employees to get a more comprehensive picture of the story. Measure the least a person can do in a single day and set it as a standard. Check this out to set your business metrics:

3. Set Clear Objectives and Goals

Examine how the employee's productivity can contribute to reaching the company's goals and set the standards according to that. Evaluate employee's productivity regularly.

4. Carry Out a Client Survey to Getting Insight

A client survey is a good tool to measure employees' productivity. The client's feedback can help to track down both good and poor performances given by employees.

5. Consider Culture

The culture within a business is also an important factor to enhance employees' productivity. Culture can also be referred to as the company's ethical or moral values, how you treat your employees and clients, and the working environment of the workplace.

This can be done by doing an employee's survey on how they feel about working for the company or by looking at other company's culture blogs. Happy employees contribute more to the betterment of the organization.

6. Identify Benchmarks and Targets

Mostly, positions have built-in benchmarks, but some companies prefer to change their benchmarks with relevance to their target and objective.

This will tell the companies to evaluate their employee's productivity and what are the factors that the employee is not able to achieve the goal.

7. Track Individual Progress

To track individual progress is also especially important, especially for bigger companies where they have many employees. To determine who is being productive and who is just procrastinating.

8. Request Daily Updates

Requesting updates from the employees at the end of the day is an excellent tool to keep them on track and let them acknowledge that they are accountable for their work.

Usually, employees prefer working at their own pace, but this can encourage them to procrastinate, which will lower their productivity. That's why it is important to ask for daily updates to keep the employees motivated and on track.

9. Account for the Human Factor

The human element is always a factor that holds great importance in the company's productivity as a whole. No matter what measures we take to enhance the employee's productivity or track it down, there is always one employee who just doesn't want to work and is always procrastinating. Then some employees give every kind of work their best shot regardless of reward or appreciation.

Each employee brings a unique set of innovative ideas and capabilities to the table and is a valuable asset to the company's growth and progress

Self-check 1	Written test

Name…………………………………………… ID……………………….. Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test II: Short Answer Questions

1. What is monitoring?(5points)

____

____

2. What is work operation? (5points)

____

____

3. Write the process of monitoring work operations(5points)

____

____

4. Discuss about work place operation(5points)

____

____

5. Mention the functions of a manager. (5points)

____

____

____

6. How do you measure the productivity of employee? (5points)

____

____

You can ask you teacher for the copy of the correct answers.

Note: Satisfactory rating - 15 points and above Unsatisfactory - below 15 points

Answer Sheet

Score = ___________

Rating: ____________

Name: ___________________________ Date: _______________

Information Sheet 2- Supporting operations in overall enterprise goals and quality assurance initiatives

2.1. Enterprise goals and quality initiatives

The goals of the enterprise are considered as a concrete description of the main tasks for the implementation of the enterprise mission and express a commitment to achieve any results in a certain period of time.

Quality assurance is concerned with the practices, processes and procedures used to assure the final quality of the product. Part of quality management focused on providing confidence that quality requirements will be fulfilled"

Quality Assurance (QA) activities include a planned system of review procedures conducted by personnel not directly involved in the inventory compilation/development process. Reviews, preferably by independent third parties, should be performed upon a finalized inventory following the implementation of QC procedures. Reviews verify that data quality objectives were met, ensure that the inventory represents the best possible estimates of emissions and sinks given the current state of scientific knowledge and data available, and support the effectiveness of the QC programme.

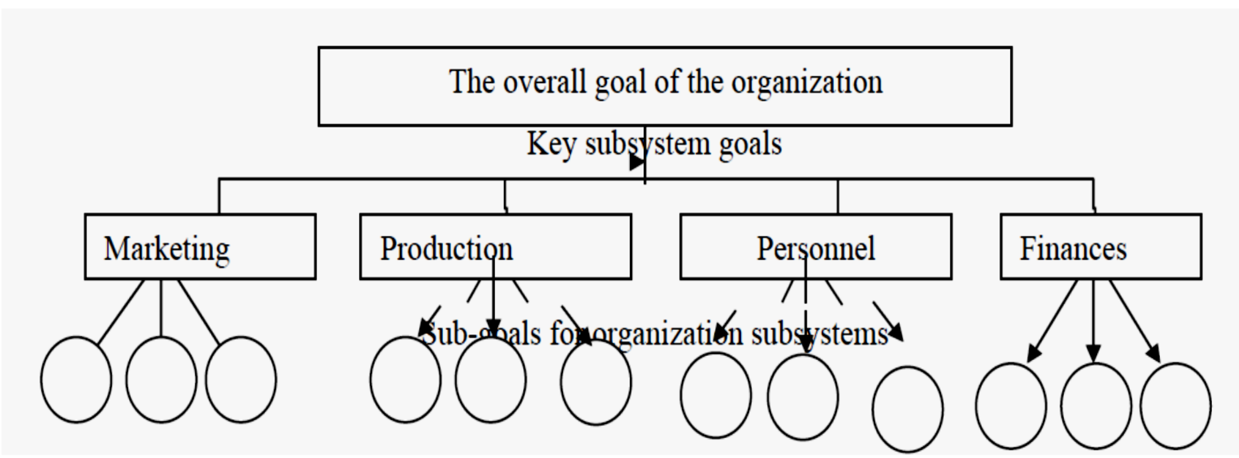

Fig. 1 The overall goal of the organization

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 work, productivity and customer satisfaction. TQM is regarded as a positive thing for organizations to be, or strive to become.

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.

Numerous benefits were achieved from the use of TQM, such as:

- Reduction in change over time
- Improved teamwork
- Reduction in cycle time

The driving themes of Total Quality are:

- Continuous improvement;
- The importance of the customer;
- Empowerment of employees;
- Business activities as processes.

2.2. Monitoring in a quality environment

Monitoring in a quality environment does not just rely on the inspection and checking of procedures and work done. It is a total concept whereby quality is built into every aspect of work operations and there is a continual process of improvement. It does not blame individuals but rather concentrates on seeking better ways to do things. The staff teams in poultry farm should really been concentrating on ways of improving quality of eggs and welfare of chickens.

They have reviewed their procedure for managing nest quality and have decided to change litters. Any aspect of work operations can be monitored with a view to improvement.

These can include:

- The procedures or systems that exist in the farm

- The workflow – that is the order in which things are done (such as the sequence of cleaning equipments and houses)
- The workload of staff – that is whether they are under-worked or over-worked at different times
- The time it takes to do a task or job
- Job design – that is whether jobs are challenging or interesting enough for staff
- Level of customer satisfaction with the service or product provided.

This does not mean all things are monitored at the same level all of the time. Generally, some sort of automatic review will be built into most work operations, such as three- or six-monthly reviews and reports.

Self-Check – 2	**Written test**

Name………………………………………… ID……………………… Date……

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. What does it mean by goals of an enterprise?(3pts)

____

____

2. What is quality assurance ?(5pts)

____

____

3. What is Total Quality Management? (4pts)

____

____

Note: Satisfactory rating – 6 points and above Unsatisfactory - below 6points

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

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

1.1. Monitoring Quality

Manager 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 farm including lack of repeat business, damage to the reputation of the venue and general decline in production and profit.

An on-going approach to monitoring workplace operations is needed to identify and address these situations.

Scope of authority

The ability of staff workers 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 farm manager
- Other more senior/experienced staff
- The owner

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 environment
- Impact on workers
- Impact on customers
- Impact on service levels.

When to monitor work operations

Monitoring should be occurring all the time. You can predict problems ahead of time, monitor as you go, or review after the event.

All of these are legitimate and effective forms of monitoring and most farm managers will use all three from time-to-time, depending on the situation.

- 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. E.g. outbreak of disease from history

- 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.

The problem is acted on immediately and a decision will made to ensure workers, chickens and products

- 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.

1.1.1. Steps in monitoring

The following are the basic steps to undertake when monitoring:

I. 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 farm
- Areas due for scheduled review.

II. Decided on method 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.

III. 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.

IV. Take appropriate action

This involves making the necessary adjustments to improve the level of service, productivity or customer satisfaction.

Depending on what is being monitored, involving workers in all or some stages of the monitoring process is likely to achieve better results.

1.1.2. 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 – 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 in the farms 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
- Stake holder and 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

Self-Check – 3	Written test

Name…………………………………………… ID……………………… Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. Define quality monitoring .(5pts)

   ____

   ____

   ____

2. What is scope of authority?(5pts)

____

____

3. Write steps of monitoring.(5points)

____

____

4. Write methods of monitoring.(5points)

____

____

____

Note: **Satisfactory rating - 10points & above** **Unsatisfactory - below 10 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________
Rating: ____________

Name: _________________________ Date: _______________

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

4.1. Changing procedures and systems

Changing 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

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

a. Changing management

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.

b. 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.

c. Introduction of new equipment

New equipment is introduced with training for staff and also requires that staff can operate the new equipment/facility

The advent of the new equipment may introduce new style of work.

d. 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.

Use of job and task analyses may underpin the development of job descriptions and specifications. Some premises may elect to out-source their recruitment practices, employing private employment agencies/consultancies, or accessing the free, national Job Network system.

e. Trends in customer preferences

Whether we lead the pack or follow the opposition, we must respond to customer preferences. These changes also have implications for work operations. Nothing really exists in true and total isolation from anything else.

Managers must monitor these shifts in customer trends to identify their impact throughout the organization, and then take appropriate action to capitalize on opportunities and to minimize negative impacts, whilst still striving to fulfill the twin dictates of efficiency and effectiveness in service delivery.

f. Human capital implications

Greater efforts must be made to develop the competence of the staff.

Company growth now comes as much from the employee development as from expansion with more employees and this applies as much to frontline service staff as to professional/ managerial staff.

Markets are complex and rapidly changing with new and more complex customer demands, products and services. Internationalization is increasing and international competition is intensifying in many markets. To ensure the right quality, companies must be better at understanding their environment and building-up the competence and ability to change before, or at the same time, as the outside world changes.

g. 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.

h. 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.

Many customers are looking for seamless service. They seek a one-stop shop for all their holiday needs. Technology is providing the means for this to be done, and for customers to access it.

4.2. Approaches to change procedures and systems

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
- 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

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
- Providing friendly and courtesy assistance without having to be asked.

Self-Check – 4	Written test

Name…………………………………………… ID………………………… Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. What are those approaches required to change procedures and systems to staff?(5pts)

____

____

2. What are those approaches required to change procedures and systems to staff?(5pts)

____

____

____

3. What are those approaches required to change procedures and systems to customers?(6pts)

____

____

____

Note: **Satisfactory rating – 8 points & above** **Unsatisfactory - below 8 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________
Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 5- Consulting colleagues about ways of improving efficiency band 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 issued that impact on its delivery. Especially , those colleagues which does not have experience, consultation by the experienced is essential to improve their work efficiency at the work place.

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
- 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 know 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.

Finally, realize there may be times when, despite the entreaties that "we can always improve", there may well be times when nothing can, or needs to be, done in relation to quality service delivery.

5.3. Providing feedback

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.

Suggesting ideas

Sometimes, on the basis of the research you have done or the experience you have encountered you will feel that adjustments have to be made to various products and services to bring them more in-line with the customer demands.

This research may have been collected through watching customers, over-hearing their comments, being given direct feedback by them, or as a result of having seen a good idea at another venue

Providing you can substantiate your claims, the property may make the adjustments you believe are necessary.

Who might these suggestions be made to?

Depending on the size and structure of the workplace you may make your suggestions to:

- The owner
- A board of directors
- A senior management group/committee

Suggestions for minor adjustments can often effectively be made verbally, but where you are proposing more substantial changes the preferred method is to make the suggestions in writing, accompanying them with any supporting evidence you might have.

- Substantial changes are changes necessitating:
- Significant expenditure of money
- Significant time to implement
- Significant alteration to existing policies and procedures

Self-Check – 5	**Written test**

Name…………………………………………… ID………………………… Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. Write consultation to be undertaken with staffs (5pts)

____

____

____

2. Discuss about to whom your feedback will be suggested? (5pts)

____

____

You can ask you teacher for the copy of the correct answers.

Score = ___________

Rating: ____________

Answer Sheet

Name: _________________________ Date: _______________

LG #106	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 to enhances efficiency and customer service quality. • Delegating work to appropriate people • Assessing workflow against agreed objectives and timelines • Providing Input regarding staffing needs to appropriate management. 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**: • Undertake how to assess current workload of colleagues accurately. • Conduct how to schedule work to enhance efficiency and customer service quality. • Understand how to delegate work to appropriate people • Undertake how to assess workflow against agreed objectives and timelines • Provide Input regarding staffing needs to appropriate management.
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”. Try to understand what are being discussed. Ask your trainer for assistance if you have hard time understanding them. 4. Accomplish the “Self-checks” which are placed following all information sheets. 5. Ask from your trainer the key to correction (key answers) or you can request your trainer to correct your work. (You are to get the key answer only after you finished answering the Self-checks)..

1.1. Assessing workloads

Workload describes the physical and mental exertion required from an employee to complete the assigned tasks. This includes assessing the number of tasks an employee will carry out, the physical and mental requirements, the work environment and the time available to complete the tasks.

Managing workloads and the change that occurs in workplaces is on a daily basis forms part of normal business planning. Early identification of issues is important to help work units meet their goals and to maintain a safe and healthy work environment.

Workload issues may be identified in a number of ways:

- by an employee or group of employees
- by a supervisor, line manager, senior manager, board or a client
- as part of the operational planning cycle
- in response to major organizational change
- unexpected peaks in work
- by a consultative committee
- Other external factors.

As a manager, team leader and supervisor 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 poultry farm 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 that the secondary tasks are ones to be done in quiet time

Effective managers will always be aware the nature of staff roles varies over time. The job of a cashier today is likely to be somewhat different today than at the same time last year. There will be new equipment and technologies, new target markets which may mean new skills, changed legislation which means stricter control or some new internal initiatives.

Managers must realize these natural, incremental changes impact on staff workloads, and management must identify what flow-on changes may need to flow from these hidden workplace modifications:

- Do staffs need more time to do their job?
- Should more staff be employed?
- Should certain services be revised or eliminated?
- Will technology help?

1.2. Workload management?

Workload management is the process of efficiently distributing and managing work across your team. When successfully done, workload management maximizes employee performance and helps melt away chaos, leaving you and your team feeling satisfied at the end of each day rather than overwhelmed. Team members will feel confident about their work volume and deliver higher quality work at a faster pace.

Guide to workload management

. Put these five steps into action so you can successfully manage your team's workload.

1. Figure out your team's workload and capacity

With your team's work scattered among multiple different project briefs, plans, and tools, it's hard to understand just how much total work you all need to tackle. Having that knowledge is key to figuring out how much each team member is doing or what they can take on. You can get past that and figure out what your team's workload actually is by getting your plans in order:

I. Put together a full list of projects and processes your team is responsible for. These can be projects your team is driving, or cross-functional work they'll be contributing to.

II. Determine the scope and timing of work for each. Are these big, complex projects with multiple deliverables or are these smaller in scope? How much of each project or process is your team responsible for?

III. Break down projects into smaller tasks and work streams. Once you have a big picture understanding of your team's work, break it into smaller chunks so you can know what their weekly or daily loads look like.

IV. Prioritize work based on importance and urgency. This way, you'll also know what your team needs to tackle first and can better schedule when you'll be working on each project.

2. Allocate resources and break down individual workloads

I. Assign out the highest priority work first. Order your team's list of to-dos and projects in terms of priority, and work on staffing the top priorities first.

II. Balance start and due dates. Now that you know who will be doing what, start scheduling each task or project. You can also implement time management strategies, like time blocking, to help team members be more intentional about their work.

III. Make sure you're matching the right people to each task or project. Take into account their availability, as well as their skill sets and experience.

IV. Include your team in the conversation by asking them what extra bandwidth they believe they have. Not only will they know their own workloads and capacity the best, but they'll also feel more empowered when you involve them in planning.

V. Always let someone know why you're assigning a particular task to them. This is a great way to increase engagement and set expectations from the outset.

3. Check in with your team members and adjust workloads as needed

Even the best-laid plans and project timelines hit roadblocks, and you'll need to be prepared to make adjustments in real time before deadlines are missed.

To track how each team member is managing their current workloads, be proactive by setting a regular 1-1 check-in with your team members for updates. If those check-ins reveal that a team member feels overloaded with responsibilities, check to see who might be able to take on something else.

When you reassign tasks or projects, be sure to communicate with your team about the changes so they understand why they're now being pulled in a different direction. Consider coaching opportunities to help them become more efficient and organized and always recognize your team members' hard work.

4. Improve team efficiency when workloads are heavy

While you're mainly focused on the big picture, encourage your team to develop their own system to manage their workload. When there's a lot to do, it's important that they're doing the right things, efficiently.

- Suggest time management strategies that fit their individual styles, like time boxing or time blocking.
- Minimize the amount of meetings your team is required to attend. Find new ways to communicate that don't take as much time.
- Help your team understand what project management is and how an organized plan saves time.

5. Onboard a work management tool

Imagine being able to see everything that's going on with every project and every team member in one single location. Talk about saving time. Using a work or project management tool does just that.

When you adopt a work management tool, every team member is able to see how their work feeds into larger team and company initiatives. Communication happens within tasks, so finding the information you need takes five seconds instead of five minutes. Timelines keep everyone on track because projects can be viewed individually or together.

Self-Check – 1	**Written test**

Name………………………………………… ID……………………… Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. Define work load. (5 pts)

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2. How do you assess work load? (10pts)

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3. Discuss about workload management.(5pts)

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

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 2- Scheduling work in manner of enhancing efficiency and customer service quality

1.1. Work schedule

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 is 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. How to evaluate insecure worker

Techniques are available to help you coach an insecure employee.

1. Ask the employee to evaluate his performance and motivation level. Often, self-appraisals can highlight discrepancies between what an employee and management think are important performance factors, according to HR World. An

insecure employee may be too hard on himself because he is uncertain what is expected of him.

2. Evaluate the employee's training record. If an employee believes she/he is not fully trained around her/his responsibilities, she/he may feel insecure. Determine whether additional training is required to improve the employee's knowledge.
3. Ask the employee to participate in a mentorship program at work. Such programs help employees adjust to varying communication styles as well as gain insight into different aspect of the company.
4. Use clear communication. Poor communication at work can misdirect employee performance levels and cause employees to check in more frequently for direction. Clearly define the nature of the work to be performed and outline the guidelines for determining whether work performance meets company standard.
5. Establish checkpoints at varying intervals. Give praise for valiant attempts at success and specific actions to boost the employee's confidence level. Checkpoints can be as frequently as once a week, if necessary. Generally speaking, give praise as close to when the behavior took place as possible.

Self-Check – 2	**Written test**

Name………………………………………… ID……………………….. Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. What is scheduling of work? (6 pts)

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2. List the end result of scheduling work. (10pts)

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Note: **Satisfactory rating - 8 points** **Unsatisfactory - below 8points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________
Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 3- Delegating work to appropriate people

3.1. Introduction

Delegation meanings

- It can mean the allocating of tasks to staff that are part of their normal duties
- It can also mean allocating some of your own duties to staff who are willing to take these on.
- the shifting of authority and responsibility for particular functions, tasks or decisions from one person (usually a leader or manager) to another.

Delegation is the leader's decision to:

1. **Lead** by providing vision and direction.
2. **Trust others** and empowering them to deliver on that trust.
3. **Develop beyond a leaders' personal capacity** by tapping into others' unique abilities and opinions.
4. **Build capacity in others** through training and new experiences.
5. **Replace him/her self** with others who can do the same job, freeing them to contribute elsewhere.

3.2. Delegating work to staffs that are part of their duties

The way that you tackle the delegation of work to staff depends on the level of staff you 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 prioritising their own tasks.

Some points to consider when delegating work are:

- Make sure you are clear about the task to be done – if you don't know what you want done how can you expect to convey this to someone else?
- 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 – ensure your replies underline you expect and encourage questions
- Continually check the staff member genuinely understands what is being said and shown to them – you may ask them questions or get them to demonstrate what is required
- Give them positive feedback – people operate better from a platform level of optimism and success, so make them positive and confident.

It is also worth thinking about how you like to receive orders or requests from others.

Essentially, staff must be treated with respect and you must be fair in the work you delegate by sharing it around amongst the entire staff and not appearing to victimise an individual or group.

When delegating you may run up against problems such as:

- Age differences – where you as a younger person are trying to delegate to an older person
- Experience differences – where you as a relatively new-comer to the industry are trying to delegate to an old-hand
- Gender issues – where the opposite sex takes exception at you trying to "tell them what to do".
- The basics remain the constant – treat people with respect, explain your 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 someone 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 realise 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.

However, in some instances, staff could feel exploited by taking on what they see as your work.

As a result, there are a number of rules to follow when delegating your work to others:

- Only delegate to those staff who are interested in taking on the work – these may be staff who have confided in you they are seeking promotion, looking for advancement or willing to accept more responsibility
- Delegate interesting and varied work, not the jobs you don't like doing yourself – it is unfair just to palm off the tedious and repetitive tasks to others. If staff don't appreciate the tasks delegated to them in the first instance, they will be unlikely to want extra work later on
- Make sure the work is suitable and achievable – don't force staff into doing things they are not cut out for or which they have said they are unsuitable. Where there are issues of security, confidentiality or areas which are commercially sensitive in nature, then it may be best not to delegate
- Provide the necessary encouragement, training and support – this means you don't
- just throw them in at the deep end and hope for the best
- Inform other staff of the delegation before the delegated work has started – this makes sure everyone knows what's going on, and provides a basis of legitimacy for the person to whom the work is delegated
- Review progress at agreed times – so both you and the person to whom the work has been delegated knows
- Everything is progressing satisfactorily. It also gives the staff member a formal chance to ask questions and share experiences

- Be available for questions and queries at all times – staff who have agreed to take on additional duties must never feel they are on their own or they have been ignored. It is vital they know they can contact you at any time with any question. No matter how trivial it may seem. This on-going support, just being there if needed, is fundamental to any delegation.

Managers should also be aware the way they delegate to other staff will be noticed and monitored by those above too. Suitable and appropriate delegation will be seen as a positive, whilst constant and trivial delegation will be seen for what it is.

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 ion that delegation experience.

When handled correctly, delegation can be a very beneficial development tool for all people involved in a hospitality organization.

How Should You Delegate?

Use the following principles to delegate successfully:

1. Clearly articulate the desired outcome. Begin with the end in mind and specify the desired results.
2. Clearly identify constraints and boundaries. Where are the lines of authority, responsibility and accountability? Should the person:
    - Wait to be told what to do?
    - Ask what to do?
    - Recommend what should be done, and then act?

- Act, and then report results immediately?
- Initiate action, and then report periodically?

3. Where possible, include people in the delegation process. Empower them to decide what tasks are to be delegated to them and when.
4. Match the amount of responsibility with the amount of authority. Understand that you can delegate some responsibility, however you can't delegate away ultimate accountability. The buck stops with you!
5. Delegate to the lowest possible organizational level. The people who are closest to the work are best suited for the task, because they have the most intimate knowledge of the detail of everyday work. This also increases workplace efficiency, and helps to develop people.
6. Provide adequate support, and be available to answer questions. Ensure the project's success through ongoing communication and monitoring as well as provision of resources and credit.
7. Focus on results. Concern yourself with what is accomplished, rather than detailing how the work should be done: Your way is not necessarily the only or even the best way! Allow the person to control his or her own methods and processes. This facilitates success and trust.
8. Avoid "upward delegation." If there is a problem, don't allow the person to shift responsibility for the task back to you: ask for recommended solutions; and don't simply provide an answer.
9. Build motivation and commitment. Discuss how success will impact financial rewards, future opportunities, informal recognition, and other desirable consequences. Provide recognition where deserved.
10. Establish and maintain control.
    - Discuss timelines and deadlines.
    - Agree on a schedule of checkpoints at which you'll review project progress.
    - Make adjustments as necessary.
    - Take time to review all submitted work.

Self-Check – 3	**Written test**

Name…………………………………………… ID……………………….. Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. What is delegation? (5 pts)

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2. What do you consider when you delegate a staff? (5pts)

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3. Write the principles of delegation? (6pts)

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Note: **Satisfactory rating - 8 points** **Unsatisfactory - below 8 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 4- Assessing workflow against agreed objectives and timelines

1.1. Assessing workflow and progress during work

Measure Progress against Work Objectives

1. Define your organization work objectives. Define the nature of the work to be performed and guidelines for determining whether its performance is satisfactory.
2. .Establish checkpoints to determine whether your timelines or implementation plans should be modified. If your organization is meeting work objectives ahead of schedule, modify the timeline. Set up a checkpoint at varying intervals such as the six-month mark or the second quarter in a calendar year.
3. Talk to your employees about how their doing with the work objectives. Have each employee measure his performance.
4. Increase organization morale by offering written or oral feedback to teams and individuals for their contributions and valiant attempts at success. Positive feedback boosts company morale and sees team members through to the completion of company goals.

The three assessing workflow and progress during work keys are:

- Walking around the working areas to observe what is happening – this includes observation of staff practice and observation of the work.
- 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.

4.2. Staff appraisal

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. 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.

As an opening gambit ask the staff member how they think they are going in relation to their goals. This good way of letting them have the first say if they believe their performance has been below expectations. It is a good tactic because it is them who are verbalizing the bad news, not you.

Allow the meeting to take whatever course is necessary providing the general focus is on the staff member's performance. 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.

Always work towards getting the staff member to agree with the plan of action decided on, so as their commitment to the solution is enhanced. Never try to simply impose a solution on the person.

Try not to dominate this discussion. The perfect meeting is one where the staff member does most of the talking and feels comfortable sharing examples of failing to achieve a set target. A meeting dominated by the manager runs the risk of sounding like a lecture, and resulting in anti-management sentiment.

Often, staffs come 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.

Finally, it is a good idea to finish the meeting with some genuine and personal statement about how you feel the person is progressing within the organization.

This helps to end what may have been a potentially anxious experience for the staff member on a positive note, and can provide reassurance they are going well, their job isn't on the line, and they are fitting in and pulling their weight.

Self-Check – 4	**Written test**

Name…………………………………………… ID……………………… Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. Write the three keys you can monitor work follows (5 pts)

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2. Write at least three things you have to do during staff appraisal as farm or supervisor(5 pts)

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Note: **Satisfactory rating – 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 5- Assisting colleagues in prioritization of workload

5.1. 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.

Workers should look to organizational goals for a lead as to which tasks should take the highest priority. In your own work, you will also need to prioritize your work.

Prioritizing doesn't necessarily mean you do the most important things first, but it does mean you fit them in ahead of less important jobs. As the old saying goes "First things, first". 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.

5.2. Assisting colleagues to prioritize their own work

As co-workers part of your role involves assisting individual staff members to prioritize their own work. You should see this as a fundamental part of your job and not as a pain, or as an inconvenience.

Remember, your ability as a manager is judged by how well or how poorly your staffs perform. Therefore, time spent helping them can also be seen as an investment in your own future.

It is certainly preferable they are able to do this for themselves, but they may require some help in the initial phases: this time should be seen as an investment in your staff.

Some suggestions for going about this are:

- Ensure a quiet and private time to sit down with the person – arrange for no interruptions
- Talk with them about their position duties, the goals of the organization and the department or unit
- Ask them to identify the most important tasks they do – note the staff member does this, not you. That said, you may provide some advice, direction and comment. Remember the aim here is for staff to become competent in managing their own workload
- Assist them to consider how they will do these tasks, and the priority order they will allocate to each of them
- Assist them to come up with a work plan to use as the basis for the actual implementation of their plan – this can be in writing with numbered priorities or lists, flowcharts, diagrams or whatever else is useful. As simplistic as it sounds, a diary can be extremely useful for many people to plan their day
- Set a time to review their plans and their progress on a regular basis
- Bear in mind the aim is to get staff to prioritize their own work, so resist the normal temptation to do it for them: doing it for them is certainly a quicker option but it will not teach them how to think for themselves, and you will have to keep repeating the job for them, forever.

Self-Check – 5	**Written test**

Name…………………………………………… ID………………………… Date……

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

1. How do you prioritize the work ? (5pts)

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2. How do you Assisting colleagues to prioritize their own work. ? (5pts)

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Note: **Satisfactory rating - 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 6- Providing input of appropriate management regarding staffing needs

6.1. Management and 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 that 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.

There can be many reasons why you can't guarantee a smooth and trouble-free workflow from your unit:

- There is actually too much work to do
- There are problems in other areas or outside the organisation which are impacting on your unit's work
- There are unreasonable demands on your unit
- Your staff have not been provided with the necessary training to do their job effectively and efficiently
- Wrong staff have been hired or engaged in the first place
- You have equipment breakdowns.

In these instances, after you have tried to work through these issues as best you can with the staff and resources you have, it will be necessary to advise management.

It is best to notify them as opposed to having them learn of the matter by themselves.

The following are tips on how to notify senior management about staffing needs:

- Choose an appropriate time to do it – strategically select a time rather than just blurt it
- out at random, or at some inappropriate time and location
- Decide whether to communicate what you have to say in private, or at an arranged meeting, in writing, or both
- Be very clear about what the problem is, and what the needs are
- Spell out in detail how you have tried to addressed the issue
- If possible, come up with recommendations to address the situation

Whilst you need to take care not to *"jump the gun and push the panic button*", it is wise to take this remedial action as soon as a problem is definitely identified.

Very few situations will fix themselves, or improve without any outside interference.

The advice to act quickly if there is a problem is sound advice in the vast majority of cases.

In addition, realize the benefit of asking staff about the problem, and seeking their input as to what can be done to repair the situation. But be advised, if you do ask staff for their opinion and recommendations, you have created the expectation you will follow their advice.

This means if you don’t follow their suggestions, you are obliged to explain why you didn’t.

To conclude, managers must be consistent in their dealings with staff and problems, and fair in their treatment of staff. Staff will watch the manager to see how they react and to note what they do. A manager who is prepared to get in and are willing to “*get their hands dirty”* will quickly gain the respect of their staff and greatly enhance their workplace credibility.

Self-Check – 6	**Written test**

Name…………………………………………… ID………………………… Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test II: Short Answer Questions

1. How do you provide input to your staff as a manager of your team?(5pts)

   ____

   ____

3. List the points by the senior managers are identify about staffing (5pts.)

   ____

   ____

2.

Note: **Satisfactory rating - 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

LG #107	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 workplace records and submitting timeframes. • Delegating and monitoring 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**: • Conduct how to complete workplace records and submitting timeframes. • Undertake how to delegate and monitor 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". Try to understand what are being discussed. Ask your trainer for assistance if you have hard time understanding them. 4. Accomplish the "Self-checks" which are placed following all information sheets. 5. Ask from your trainer the key to correction (key answers) or you can request your trainer to correct your work. (You are to get the key answer only after you finished answering the Self-checks).

Information Sheet 1- Completing workplace records and submitting timeframes

1.1. workplace records

Workplace records are an important part of any work environment and should be accurately maintained within the required timeframes.

There can be severe legal and financial implications if records are not kept as required, are inaccurate, are incomplete and/or are not kept up-to-date.

Types of workplace records

Records in the natural resources based organization can include:

- Staff records
- Performance reports
- Fire safety checks
- OHS inspections, risk assessments, and reports
- Security records
- Incident register
- Receipt of goods documentation
- Accident and disease outbreak
- Financial records
- Banking details
- cleaning records
- Equipment maintenance records
- Subcontracting agreements and compliance documentation

Types of 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 are those records kept that relate to staff as a whole.

They are important planning tools and allow a manager to gain an overview of what is happening with staff movements and training.

They include the following:

- Staffing rosters
- Training details by operational area

- Annual leave planning chart
- Salary and overtime payments
- Incident records.
- Individual staff records relate to individual staff and can include the following:
  - ✓ Position description
  - ✓ Letter of appointment
  - ✓ Signed employment contract or offer of employment
  - ✓ Performance review records
  - ✓ Copies of certificates held by the employee
  - ✓ Leave records – such as annual leave, sick leave and maternity or paternity leave
  - ✓ Record of PPE order
  - ✓ Training schedule
  - ✓ Direct salary deduction details
  - ✓ Injury claims.

Check with your employer to determine which of the above you are responsible for and if you are required to complete any other records.

When dealing with these records it is important to maintain confidentiality and to ensure the privacy of the information.

Also, there is a need to make sure the records are kept up-to-date or they become essentially useless and the records are kept in such a way that facilitates their easy access.

Managers are advised to investigate any individual establishment requirements relating to the keeping of records and to ensure they are observed.

Self-Check – 1	**Written test**

Name... ID.............................. Date.......

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. What is work place records?(5pts)

____

____

2. Write the types work place records?(5pts)

____

____

Note: **Satisfactory rating - 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 2-. Delegating and monitoring appropriate completion of records prior to submission

2.1. Delegating and monitoring

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.

The manager of a work area is unlikely to personally attend to all of the records in their work area. But they are accountable for their accuracy. For this reason, a manager must be prepared to delegate such tasks and have a system for regularly monitoring such records.

Staff may be given required to complete records such as:

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

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.

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 – to ensure the records accurately reflect workplace practice and events.

It is a wise manager who defers delegating record keeping tasks until they themselves understand and appreciate all aspects of the job in question.

Self-Check – 2	**Written test**

Name…………………………………………… ID……………………….. Date…….

Directions: Answer all the questions listed below. Examples may be necessary to aid some explanations/answers.

Test I: Short Answer Questions

1. What type of records given to the staff to complete? (5pints)

   ____

   ____

2. How delegating authority and responsibility involves for completion of such records? (5 points)

   ____

   ____

Note: **Satisfactory rating - 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

LG #108	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 workplace problems • Initiating short term action to resolve the immediate problem • Analyzing problems for any long term impact and assessing • Encouraging a team member to participate in solving the problem • Taking follow up action to monitor the effectiveness of solutions. 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**: • Conduct how to Identify workplace problems • Undertake how Initiate short term action to resolve the immediate problem • Analyze problems for any long term impact • Encourage a team member to participate in solving the problem • Conduct how take follow up action to monitor the effectiveness of solutions.
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". Try to understand what are being discussed. Ask your trainer for assistance if you have hard time understanding them. 4. Accomplish the "Self-checks" which are placed following all information sheets. 5. Ask from your trainer the key to correction (key answers) or you can request your trainer to correct your work. (You are to get the key answer only after you finished answering the Self-checks).

Information Sheet 1- Identifying workplace problems

1.1. General

Workplace is regarded to be an imperative area for the individuals, primarily the adults, who are engaged in full time jobs. Problems that can be happened at the workplace, may sometimes negative. The problems and issues within the workplace are:

- with regards to the work timings,
- working environmental conditions,
- relationships with the superiors and the subordinates,
- effective communication,
- resolution of conflicts and disputes,
- stress in the performance of work duties,
- mental health problems,
- strictness on the part of the employers and supervisors,
- lack of knowledge and information and
- Sexual harassment of women at the workplace.

Problem solving and decision making are two key tasks of any the team leader, supervisor and manager. The ability to deal quickly and effectively with workplace problems are standard ongoing requirements for any workers and manager and will be a significant indicator of his/ her effectiveness.

1.2. Possible workplace Problems

The very nature of problems is that they are often unexpected and they seem to come at the worst of times, such as when you are busy, short staffed or dealing with another problem.

They can show up in many ways, for example, as:

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

- Decreases in takings and patronage.

An experienced manager recognises dealing with these issues as they arise and before they fully develop is what makes good management.

Solutions

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, or the reasons for the decision are explained to those who are not directly involved. This is yet another example of the importance of communication throughout the department in an on-going and honest way
- It is clear and unambiguous
- It is in-line with stated organizational goals
- It aligns with organizational policies, vision, values etc
- All the implications of the decision have been thought through.

1.3. Steps in problem solving

The main steps in problem solving are:

I. Identifying the problem

Often a problem will be obvious to all concerned. But sometimes it is not easy to work out what the problem is. All that is known is there are a complaint, results not achieved or staff seem to be unhappy. It is important to take time to thoroughly investigate what the problem or issue is before taking any action.

Problem identification can be done by:

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

Remember, there can often be more than one problem that is causing difficulties.

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.

Considering options

Once the problem has been identified you need to:

- Identify your desired outcomes.
- For example, if you decide the problem is one of staff absenteeism through low morale, then your desired outcome will be to reduce the level of absenteeism to a level you specify and to increase morale.
- Also consider outcomes from an operational and a customer service perspective.

Look at what alternative options you have for solving the problem.

Sometimes there will only be one real option, whilst at other times there are a variety of options to pick from.

Options can be canvassed by:

- Meeting with staff to jointly come up with a solution
- Researching options
- Seeking expert advice
- Speaking to your supervisor
- Evaluating the alternatives and selecting the most suitable option

II. Decision making

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 – customers, staff and management
- The impact of the decision – immediately and in an ongoing way
- The cost of the decision and whether you have the resources to implement it
- Whether your decision is likely to fix the real problem or just cover it up.

III. Convey decision to relevant parties

It is important to convey the decision to all relevant parties, together with an explanation of the reason for the decision.

In particular, it helps to provide an explanation if a change is being made.

Sometimes it is best to provide this information in writing as well as in person.

IV. Reviewing decision

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.

Self-Check -1	**Written Test**

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Write the problems that may happen at work palace (5pts)

____

____

____

2. Write the steps of problem solving (5pts)

____

____

____

Note: **Satisfactory rating – 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ____________

Rating: _____________

Name: _________________________ Date: _______________

2.1. Short term action to resolve immediate problem

Actions taken within an operation workplace context can be seen as either short term action or long term action.

Reasons for short-term action

Reasons for this include:

- Pressure of work often means there just isn't time to stop and analyse 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.

Self-Check -2	**Written Test**

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. What are the reasons that require short term solutions?(5 points)

   - ____
   ____
   ____

2. What idea you should use for if you want to use short term approach? (5 points)

   ____
   ____
   ____

Note: **Satisfactory rating - 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

3.1. Nature of problems

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.

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.

Where the above exists there is a need to do some long term planning.

To seek a particular figure in terms of occurrence of the problem may not be instructive – is once a week or twice a month be enough?

It is difficult to set this type of figure because such an orientation fails to take into account all the other possible related factors. For example, you would definitely want to undertake long term planning for some event that only occurred every two years but had the potential to cost the hotel substantial money, inconvenience regular guests, require an extra 100 staff short term whilst only generating small profits?

The key then is to first identify the problems which warrant or merit long term consideration. To do this, draw up an all-inclusive list which includes every single thing that you realistically expect to be a problem. Then arrange a time to meet with senior management to discuss it. Seek their advice and be guided by them.

3.2. Suggestions for long-term action

Having identified the problems worthy of long-term planning attention, consider the following points as they are all common to most problem-solving models around:

- Identify the problem and describe the nature of it in the most all-encompassing terms possible. You really have to understand the full extent of the problem to have any chance of its successful resolution. The more information the better. Is this a critical issue threatening the viability of the property, or an inconvenience? Does it fall somewhere in between?
- Identify the cause of the problem – what's making this happen? Often, identifying the cause is a major part of solving the problem, but not always. There can be more than one cause.
- Check, verify and test that what you believed to the cause is actually the cause. Are you on the right track, or not? Don't be afraid to go back to the drawing board. Never expect to solve this thing at the first go.
- Describe and classify the people who are affected by the problem. Is the problem actually going to cause the widespread damage you initially expected or is it a relatively small fallout problem?
- Nominate the nature and result of the adverse effects on the people listed above – how detrimental, how bad will the problem make things?
- Determine the amount of time that the problem will occur for. Is the problem one that is time-related? That is, will the problem drag on for a period of time that can be seen as „too long"? Alternatively, is it something that can be tolerated, cause a minor inconvenience, but not warrant too much time, energy or money being spent?
- Analyze all legal implications pertaining to the problem – where do we stand if we do nothing?

Determine the costs involved in the problem – at this stage consider the costs of doing nothing compared to taking some form of action

Integrate the loss from the problem into the overall operation, profitability and viability of the operation. What will be the long-term result of doing nothing? Is it operationally a considered and viable solution to do nothing about this problem?

List all possible solutions. When a set of possible of solutions have been established, they need to be investigated for action.

Those involved will depend on the problem but may include customers, other managers, owners, suppliers, partners, staff and officials from various government authorities.

The point being these people should be involved from the outset, not simply notified of your decision or become aware of it on their own accord.

The critical point at this stage is to think through all the possible long term impacts of the solution and to attach figures to these responses. It is a simple fact of business everything costs money and most decisions are made on the basis of some cost-benefit analysis.

When these investigations have been done, some method of reporting back needs to be undertaken. This can be a verbal address at a meeting of those concerned, and written reports outlining research and investigation undertaken, describing other related implications and issues, and costing proposals.

In many cases, there will be a requirement to make a recommendation, that is, to pick one of the alternatives and promote it. This requires you as the manager to explain why the other options aren't viable, and why the one you have selected is indeed the best choice.

Where the problem concerned does not require you to rush in to a decision, the best advice is to spend time doing your research and discovering everything possible about the issue. You cannot have too many facts at your fingertips. You need to be able to defend your decision, especially if it turns out to be a bad one, by referring to the large amount of supporting and indicative material you researched and assembled.

It is also a wise plan to try to get other senior people to agree with your intention before making it a recommendation. Even better if a committee comes to the decision

Self-Check -3	**Written Test**

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. What kind of have long term impact?(5points)

____

____

____

2. What are the suggestion for long term action(5points)

____

____

____

____

Note: **Satisfactory rating - 5 points** **Unsatisfactory - below 5 points**

You can ask you teacher for the copy of the correct answers.

Answer Sheet

Score = ___________

Rating: ____________

Name: _________________________ Date: _______________

Information Sheet 4- Encouraging a team member to participate in solving the problem

4.1. Systems of encouraging a team member to participate in solving the problem

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.

Throughout your working week, problems brought to you 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.

Techniques to facilitate this include:

- 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

Providing your thoughts on resolving the situation including the reasons why you believe your ideas might work. Encouraging them to implement an identified possible solution

The key to this approach is to build their ability to make better decisions and to gain the confidence and experience to make those decisions.

In order to participate the team in problem solving the organization should facilitate a training how to solve and effective problem-solving process, how to Identify the issues., understand everyone's interests, List the possible solutions (options), evaluate the options, select an option or options, document the agreement(s) ,agree on contingencies, monitoring, and evaluation.

Self-Check -4	**Written Test**

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. Identify problems solved by managers and the staff colleagues (10pts)

____
____
____

2. Write the techniques used to get involved the staff member to solve the problems.(10 points)

____
____
____
____

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

Answer Sheet

Score = ____________
Rating: _____________

Name: _________________________ Date: _______________

Information Sheet 5- Taking follow up action to monitor the effectiveness of solutions

5.1. Follow up and monitor the effectiveness of solutions

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.

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 stakeholders

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. This 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.

The intent is simply to verify things are on track, or to identify if and where they are not.

Where things are not proceeding as planned, this session is doing its job. It is highlighting something needs more attention.

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. Where a further or on-going problem is identified, those concerned must likewise be informed so they too can learn from the experience and so they may re-group in order to come up with another solution.

Never believe just because someone has got something wrong this time, they will continue to do so. Often the best person for the job can be the one who has made the most mistakes. They are the very person who should know most about it!

As the old saying goes "the person who never made a mistake, never made anything".

Self-Check -5	**Written Test**

Directions: Answer all the questions listed below. Use the Answer sheet provided in the next page:

1. How can you measure outcome? (5pts)

____
____
____
____

2. How can you measure effectiveness? (5pts)

____
____
____
____

Note: **Satisfactory rating - 5 points** **Unsatisfactory - below 5 points**

Answer Sheet

Score = ___________
Rating: ____________

Name: _________________________ Date: _______________

Reference Materials

Book:

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WEB ADDRESSES

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