## **COMPETENCY STANDARDS**



# BEVERAGE PRODUCTS DEVELOPMENT LEVEL IV

TOURISM (HOTEL AND RESTAURANT)
SECTOR

TECHNICAL EDUCATION AND SKILLS DEVELOPMENT AUTHORITY
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## COMPETENCY STANDARDS FOR BEVERAGE PRODUCTS DEVELOPMENT LEVEL IV

#### **SECTION 1 DEFINITION**

The **BEVERAGE PRODUCTS DEVELOPMENT LEVEL IV** qualification consists of competencies that a person must achieve to specialize in the creation, selection, preparation, and presentation of a wide range of beverages, including alcoholic and non-alcoholic drinks. It focuses on the in-depth knowledge of various beverages, their ingredients, flavors, and serving techniques.

Beverage specialists often work in the hospitality industry, such as bars, restaurants, cafes, and hotels, where they craft unique and appealing beverage offerings, curate drink menus, advise customers on drink choices, and ensure high-quality and enjoyable beverage experiences.

The units of competency comprising this qualification include the following:

| Code                 | BASIC COMPETENCIES  |  |
|----------------------|---|--|
| 500311401            | Utilize specialized communication skill   |  |
| 500311402            | Develop and lead teams  |  |
| 500311403            | Perform higher-order thinking processes and apply techniques in the workplace                 |  |
| 500311404            | Contribute to the practice of social justice in the workplace                                 |  |
| 500311405            | Manage innovative work instructions   |  |
| 500311406            | Manage and evaluate usage of information  |  |
| 500311407            | Lead in improvement of occupational safety and health (OSH) programs, policies and procedures |  |
| 500311408            | Lead towards improvement of environmental work programs, policies and procedures              |  |
| 500311409            | Sustain entrepreneurial skills  |  |
| Code                 | COMMON COMPETENCIES   |  |
| TRS141208            | Maintain hospitality industry knowledge   |  |
| TRS141209            | Perform child protection duties relevant to the tourism industry                              |  |
| TRS141210            | Develop and supervise operational approaches  |  |
| TRS141211            | Manage quality customer service   |  |
| TRS141212            | Manage finances within a budget   |  |
| TRS141213            | Plan and implement a series of training events  |  |
| TRS141214            | Use the assessment system for training outcomes   |  |
| Code                 | CORE COMPETENCIES   |  |
| AB-TRS-1380600513301 | Conduct research on beverage development  |  |
| AB-TRS-1380600513302 | Develop beverages   |  |

#### A person who has achieved this qualification is competent to be:

Beverage Specialist

#### SECTION 2 COMPETENCY STANDARD

This section gives the details of the contents of the units of competency required in **BEVERAGE PRODUCTS DEVELOPMENT LEVEL IV.** 

**BASIC COMPETENCIES** 

UNIT OF COMPETENCY : UTILIZE SPECIALIZED COMMUNICATION SKILLS

UNIT CODE : 500311401

**UNIT DESCRIPTOR** This unit covers the knowledge, skills and attitudes required

to use specialized communication skills to meet specific needs of internal and internal clients, conduct interviews,

facilitate discussion with groups, and contribute to the

development of communication strategies.

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED SKILLS   |
|--|---|---|---|
| Meet common and specific communication needs of clients and colleagues | 1.1 Specific communication needs of clients and colleagues are identified and met 1.2 Different approaches are used to meet communication needs of clients and colleagues 1.3 Conflict is addressed promptly in a manner which does not compromise the organization | 1.1 Communication processes 1.2 Dynamics of groups and different styles of group leadership 1.3 Communication skills relevant to client groups 1.4 Flexibility in communication | 1.1 Full range of communication techniques including: 1.1.1 Effective communication process 1.1.2 Active listening 1.1.3 Giving/ receiving feedback 1.1.4 Interpretation of information 1.1.5 Role boundaries setting 1.1.6 Negotiation 1.1.7 Establishing empathy 1.1.8 Conduct seminars 1.1.9 Public speaking  1.2 Communication skills required to fulfill |

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED SKILLS   |
|--|---|--|---|
|  |   |  | job roles as specified by the organization  |
| 2. Contribute to the development of communication strategies | 2.1 Strategies for internal and external dissemination of information are developed, promoted, implemented and reviewed as required 2.2 Channels of communication are established and reviewed regularly 2.3 Coaching in effective communication is provided 2.4 Work related network and relationship are maintained 2.5 Negotiation and conflict resolution strategies are used where required 2.6 Communication with clients and colleagues is performed appropriate to individual needs and organizational objectives | 2.1 Communication process 2.2 Dynamics of groups and different styles of group leadership 2.3 Openness and flexibility in communication 2.4 Communication skills relevant to client groups | 2.1 Full range of communication techniques including: 2.1.1 Effective communication process 2.1.2 Active listening 2.1.3 Giving/ receiving Feedback 2.1.4 Interpretation of information 2.1.5 Role boundaries setting 2.1.6 Negotiation 2.1.7 Establishing empathy 2.1.8 Openness and flexibility in communication  2.2 Communication skills required to fulfill job roles as specified by the organization |
| 3. Deliver a technical presentation                          | 3.1 Presentation is delivered clearly, sequential and delivered within allotted time 3.2 Utilize appropriate media to enhance presentation 3.3 Differences in views/opinions are respected 3.4 Questions during fora are responded in a manner consistent with organizational standard  | 3.1 Communication process 3.2 Dynamics of groups and different styles of group leadership 3.3 Openness and flexibility in communication 3.4 Communication skills relevant to client groups | 3.1 Full range of communication techniques including: 3.1.1 Effective communication process 3.1.2 Active listening 3.1.3 Giving/receiving feedback 3.1.4 Interpretation of information 3.1.5 Role boundaries setting 3.1.6 Negotiation  |

| ELEMENT                        | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED SKILLS  |
|--------------------------------|--|--|--|
|                                |  |  | 3.1.7 Establishing empathy 3.1.8 Openness and flexibility in communication 3.19 Communication skills required to fulfill job roles as specified by the organization  |
| 4. Represent the organization  | 4.1 When participating in internal or external forums, presentation is relevant, appropriately researched and presented in a manner to promote the organization 4.2 Presentation is clear and sequential and delivered within a predetermined time 4.3 Utilize appropriate media to enhance presentation 4.4 Differences in views are respected 4.5 Written communication is consistent with organizational standards 4.6 Inquiries are responded in a manner consistent with organizational standard 4.7 Consolidate ideas and suggestions 4.8 Generalize and summarize all ideas and suggestions | 4.1 Communication process 4.2 Dynamics of groups and different styles of group leadership 4.3 Openness and flexibility in communication 4.4 Communication skills relevant to client groups | 4.1 Full range of communication techniques including: 4.1.1 Effective communication process 4.1.2 Active listening 4.1.3 Giving/ receiving feedback 4.1.4 Interpretation of information 4.1.5 Role boundaries setting 4.1.6 Negotiation 4.1.7 Establishing empathy 4.1.8 Openness and flexibility in communication 4.2 Communication skills required to fulfill job roles as specified by the organization |
| 5. Facilitate group discussion | 5.1 Mechanisms which enhance effective group interaction is defined and implemented 5.2 Strategies which encourage all group   | 5.1 Communication process 5.2 Dynamics of groups and different styles of group leadership  | 5.1 Full range of communication techniques including: 5.1.1 Effective communication process  |

| ELEMENT              | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED SKILLS   |
|----------------------|--|--|---|
|                      | members to participate are used routinely 5.3 Objectives and agenda for meetings and discussions are routinely set and followed 5.4 Relevant information is provided to group to facilitate outcomes 5.5 Evaluation of group communication strategies is undertaken to promote participation of all parties 5.6 Specific communication needs of individuals are identified and addressed | 5.3 Openness and flexibility in communication 5.4 Communication skills relevant to client groups   | 5.1.2 Active listening 5.1.3 Giving/receiving feedback 5.1.4 Interpretation of information 5.1.5 Role boundaries setting 5.1.6 Negotiation 5.1.7 Establishing empathy 5.1.8 Openness and flexibility in communication  5.2 Communication skills required to fulfill job roles as specified by the organization  |
| 6. Conduct interview | 6.1 A range of appropriate communication strategies are employed in <i>interview situations</i> 6.2 Records of interviews are made and maintained in accordance with organizational procedures 6.3 Effective questioning, listening and nonverbal communication techniques are used to ensure that required message is communicated  | 6.1 Communication process 6.2 Dynamics of groups and different styles of group leadership 6.3 Effective questioning techniques 6.4 Communication skills relevant to client group | 6.1 Full range of communication techniques including: 6.1.1 Effective communication process 6.1.2 Active listening 6.1.3 Giving/ receiving feedback 6.1.4 Interpretation of information 6.1.5 Role boundaries setting 6.1.6 Negotiation 6.1.7 Establishing empathy  6.2 Effective clarifying and probing techniques (questioning skills) 6.3 Communication skills required to |

| ELEMENT | PERFORMANCE<br>CRITERIA<br>Italicized terms are<br>elaborated in the Range of<br>Variables | REQUIRED<br>KNOWLEDGE | REQUIRED SKILLS  |
|---------|--|-----------------------|--|
|         |  |                       | fulfill job roles as<br>specified by the<br>organization |

| VARIABLE                       | RANGE   |
|--------------------------------|---|
| 1. Strategies                  | May include: 1.1 Recognizing own limitations 1.2 Referral to specialists 1.3 Utilizing techniques and aids 1.4 Providing written drafts 1.5 Verbal and non verbal communication   |
| 2. Effective group interaction | May include: 2.1 Identifying and evaluating what is occurring within an interaction in a non judgmental way 2.2 Using active listening 2.3 Making decision about appropriate words, behavior 2.4 Putting together response which is culturally appropriate 2.5 Expressing an individual perspective 2.6 Expressing own philosophy, ideology and background and exploring impact with relevance to communication 2.7 Openness and flexibility in communication |
| 3. Types of Interview          | May include: 3.1 Related to staff issues 3.2 Routine 3.3 Confidential 3.4 Evidential 3.5 Non disclosure 3.6 Disclosure  |
| 4. Interview situations        | May include: 4.1 Establish rapport 4.2 Elicit facts and information 4.3 Facilitate resolution of issues 4.4 Develop action plans 4.5 Diffuse potentially difficult situation  |

| Critical aspects of Competency | Assessment requires evidence that the candidate:  1.1 Demonstrated effective communication skills with clients accessing service and work colleagues  1.2 Adopted relevant communication techniques and strategies to meet client particular needs and difficulties |
|--------------------------------|---|
| Resource     Implications      | 2.1 Access to appropriate workplace where assessment can take place   |
| 3. Methods of Assessment       | Competency in this unit may be assessed through: 3.1 Case Study 3.2 Interview 3.3 Portfolio 3.4 Written Test 3.5 Role Play  |
| Context for     Assessment     | 4.1 This unit should be assessed on the job through simulation  |

UNIT OF COMPETENCY : DEVELOP AND LEAD TEAMS

UNIT CODE : 500311402

**UNIT DESCRIPTOR** : This unit covers the skills, knowledge and attitudes required

to determine individual and team development needs and

facilitate the development of the workgroup.

| ELEMENT                     | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|-----------------------------|--|--|--|
| 1. Foster individual growth | 1.1 Learning and development needs of team members are systematically identified in line with organizational requirements 1.2 Development plan to meet individual needs is collaboratively developed and implemented 1.3 Individuals are encouraged to self - evaluate performance and identify areas for improvement 1.4 Feedback on performance of team members is collected from relevant sources and compared with established team learning process | 1.1 Effective workplace communication, coaching and mentoring principles 1.2 Feedback principles and procedures 1.3 Working interdependently: strategies and techniques 1.4 Leadership Concepts:  Types of Decisions Teams Make Team Responsibilitie s Problems That Affect Teams Building Strong Team Communicatio n Expressing Yourself on a Team Team Problem Solving | and understand a variety of texts, prepare general information and documents according to target audience; spell with accuracy; use grammar and punctuation effective relationships and conflict management 1.2 Coaching and mentoring skills to provide support to colleagues 1.3 Communication skills including receiving feedback and reporting, maintaining effective relationships and conflict management 1.4 Ability to relate to people from a range of social, cultural, physical and mental backgrounds 1.5 Planning skills to organize required resources and equipment to meet learning needs 1.6 Reporting skills to organize information; assess information for |

| ELEMENT                                    | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|--|---|--|--|
|  |   |  | relevance and accuracy; identify and elaborate on learning outcomes 1.7 Facilitation skills to conduct small group training sessions |
| 2. Foster individual and team growth       | 2.1. Learning and development program goals and objectives are identified to match the specific knowledge and skills requirements of competency standards 2.2. Learning delivery methods are appropriate to the learning goals, the learning style of participants and availability of equipment and resources 2.3. Workplace learning opportunities and coaching/ mentoring assistance are provided to facilitate individual and team achievement of competencies 2.4. Resources and timelines required for learning activities are identified and approved in accordance with organizational requirements | 2.1 Advanced coaching and mentoring techniques 2.2 Performance evaluation concepts 2.3 Training and development techniques | 2.1 Instructional planning and delivery skills 2.2 Monitoring and evaluation skills 2.3 Mentoring and coaching skills                |
| 3. Monitor and evaluate workplace learning | 3.1 Feedback from individuals or teams is used to identify and implement improvements in future learning arrangements 3.2 Outcomes and performance of individuals/teams are assessed and recorded to determine the  | 3.1 Types and levels of learning evaluation 3.2 Learning styles and strategies 3.3 Training and development approaches     | 3.1 Instructional planning and delivery skills 3.2 Monitoring and evaluation skills 3.3 Mentoring and coaching skills                |

| ELEMENT                                    | PERFORMANCE CRITERIA Italicized terms are   | REQUIRED  | REQUIRED  |
|--|---|---|---|
|  | elaborated in the Range of Variables  | KNOWLEDGE   | SKILLS  |
|  | effectiveness of development programs and the extent of additional support 3.3 Modifications to learning plans are negotiated to improve the efficiency and effectiveness of learning 3.4 Records and reports of competency are maintained within organizational requirement                      |   |   |
| 4. Develop team commitment and cooperation | 4.1 Open communication processes to obtain and share information is used by team  4.2 Decisions are reached by the team in accordance with its agreed roles and responsibilities  4.3 Mutual concern and camaraderie are developed in the team  4.4 Career planning for each member are monitored | 4.1 Career development for group members 4.2 Principles of team commitment and cooperation 4.3 Team dynamics and performance                                      | 4.1 Instructional planning and delivery skills 4.2 Monitoring and evaluation skills 4.3 Mentoring and coaching skills                               |
| 5. Facilitate accomplishment of team goals | 5.1 Team members actively participated in team activities and communication processes 5.2 Teams members developed individual and joint responsibility for their actions 5.3 Collaborative efforts are sustained to attain organizational goals  | 5.1 Group Development Process and Principles as applied in the workplace 5.2 Principles of organizational development 5.3 Collaboration principles and procedures | 5.1 Instructional planning and delivery skills 5.2 Monitoring and evaluation skills 5.3 Mentoring and coaching skills 5.4 Organizational leadership |

| VARIABLE                       | RANGE  |
|--------------------------------|--|
| 1. Learning and development    | May include:   |
| needs                          | 1.1 Coaching, mentoring and/or supervision             |
|                                | 1.2 Formal/informal learning program                   |
|                                | 1.3 Internal/external training provision               |
|                                | 1.4 Work experience/exchange/opportunities             |
|                                | 1.5 Personal study                                     |
|                                | 1.6 Career planning/development                        |
|                                | 1.7 Performance appraisals                             |
|                                | 1.8 Workplace skills assessment                        |
|                                | 1.9 Recognition of prior learning                      |
|                                | 1.10 Job design and enrichment                         |
| 2. Organizational requirements | May include:   |
|                                | 2.1 Quality assurance and/or procedures manuals        |
|                                | 2.2 Goals, objectives, plans, systems and processes    |
|                                | 2.3 Legal and organizational policy/guidelines and     |
|                                | requirements   |
|                                | 2.4 Safety policies, procedures and programs           |
|                                | 2.5 Confidentiality and security requirements          |
|                                | 2.6 Business and performance plans                     |
|                                | 2.7 Ethical standards                                  |
|                                | 2.8 Quality and continuous improvement processes and   |
|                                | standards  |
| 3. Feedback on performance     | May include:   |
|                                | 3.1 Formal/informal performance appraisals             |
|                                | 3.2 Obtaining feedback from supervisors and Colleagues |
|                                | 3.3 Obtaining feedback from clients                    |
|                                | 3.4 Personal and reflective behavior strategies        |
|                                | 3.5 Routine and organizational methods for monitoring  |
|                                | service delivery                                       |
| 4. Learning delivery methods   | May include:   |
|                                | 4.1 On the job coaching or mentoring                   |
|                                | 4.2 Problem solving                                    |
|                                | 4.3 Presentation/demonstration                         |
|                                | 4.4 Formal course participation                        |
|                                | 4.5 Work experience                                    |
|                                | 4.6 Involvement in professional networks               |
|                                | 4.7 Conference and seminar attendance                  |
|                                | 4.8 Induction  |

| Critical aspects of Competency | Assessment requires evidence that the candidate: 1.1. Identified and implemented learning opportunities for others 1.2. Gave and received feedback constructively 1.3. Facilitated participation of individuals in the work of the team 1.4. Negotiated learning plans to improve the effectiveness of learning 1.5. Prepared learning plans to match skill needs 1.6. Accessed and designated learning opportunities |
|--------------------------------|---|
| 2. Resource<br>Implications    | The following resources should be provided: 2.1. Access to relevant workplace or appropriately simulated environment where assessment can take place 2.2. Materials relevant to the proposed activity or tasks  |
| 3. Methods of Assessment       | Competency in this unit may be assessed through: 3.1. Observation of work activities of the individual member in relation to the work activities of the group 3.2. Observation of simulation and or role play involving the participation of individual member to the attainment of organizational goal 3.3. Case studies and scenarios as a basis for discussion of issues and strategies in teamwork                |
| 4. Context for<br>Assessment   | 4.1. Competency may be assessed in workplace or in a simulated workplace setting 4.2. Assessment shall be observed while tasks are being undertaken whether individually or in-group  |

UNIT OF COMPETENCY : PERFORM HIGHER-ORDER THINKING PROCESSES

AND APPLY TECHNIQUES IN THE WORKPLACE

UNIT CODE : 500311403

UNIT DESCRIPTOR : This unit of covers the knowledge, skills and attitudes

required to use fundamental critical thinking skills in the

workplace.

| ELEMENTS   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED SKILLS  |
|--|---|---|--|
| 1. Evaluate effectivene ss and efficiency of the workplace systems, processes and procedure s. | and efficiency of workplace standards and procedures are examined.  1.2. Usage of inquiry and dialogue to communicate evaluation measures and results are implemented.  1.3 Evaluation reports are prepared and communicated to team members. | 1.1 Systems, standards, procedures and protocols in the workplace. 1.2 Different methods of critical and appreciative inquiry and their relevance to different situations 1.3 Techniques to assist in forming the habit of asking questions and taking responsibility for answers. 1.4 Why questions are important and the benefits of asking good questions for individuals, businesses and communities (the importance of critical thinking). | 1.1 Using range of analytical techniques (e.g., planning, attention, simultaneous and successive processing of information).  1.2 Communicating to actively listen and to ask questions of others in a constructive way.  1.3 Using critical thinking pathway to formulate and ask relevant questions and come up with appropriate answers.  1.4 Performing assimilation and accommodation skills to interpret and distil key information of relevance to a given situation.  1.5 Assessing and measuring the extent of effectiveness and efficiency of the systems, |

| ELEMENTS  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED SKILLS   |
|---|---|--|---|
|   |   |  | processes and procedures in the workplace   |
| 2. Foster the habit of critical inquiry and curiosity in the workplace. | 2.1 Issues and situations are reflected on and wondered about. 2.2 Issues and problems in the workplace particularly in the policies, procedures and protocols are discussed and evaluated between and among teams. 2.3 Evaluation of efficiency and effectiveness of workplace policies, procedures and protocols are documented, communicated and agreed upon between and among teams. 2.4 Growth mindset and positive relationship and communication is applied in the context of curiosity and critical inquiry in the workplace. | 2.1 Different methods of critical and appreciative inquiry and their relevance to different situations.  2.2 Techniques to assist in forming the habit of asking questions and taking responsibility for answers.  2.3 Why questions are important and the benefits of asking good questions for individuals, businesses and communities (the importance of critical thinking).  2.4 Growth mindset and positive communication and relationship strategies and techniques. | 2.1 Using range of analytical techniques (e.g., planning, attention, simultaneous and successive processing of information). 2.2 Communicating to actively listen and to ask questions of others in a constructive way. 2.3 Using critical thinking pathway to formulate and ask relevant questions and come up with appropriate answers. 2.4 Performing assimilation and accommodation skills to interpret and distil key information of relevance to a given situation. 2.5 Assessing and measuring the extent of effectiveness and efficiency of the systems, processes and procedures in the workplace. 2.6 Communicating insights on workplace effectiveness and efficiency. |
| 3. Develop practical action plans for improving workplace conditions.   | 3.1 Evaluation of efficiency and effectiveness of workplace policies, procedures and protocols are documented,  | 3.1 Different methods of critical and appreciative inquiry and their relevance to different situations. 3.2 Techniques to assist in forming the habit of   | 3.1 Using range of analytical techniques (e.g., planning, attention, simultaneous and successive processing of information).  |

| ELEMENTS | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED SKILLS   |
|----------|---|--|---|
|          | communicated to stakeholders. 3.2 <i>Practical action plans</i> in improving workplace conditions are formulated, presented and negotiated with stakeholders. 3.3 Proposed changes and directions are inquired, processed and negotiated between and among teams, and stakeholders as well of the organization. 3.4 Commitment to continuous improvement and change is highlighted. 3.5 Passion and dedication for changing and adapting to the demands of the 21st century workplace are considered. | asking questions and taking responsibility for answers.  3.3 Why questions are important and the benefits of asking good questions for individuals, businesses and communities (the importance of critical thinking).  3.4 Growth mindset and positive communication and relationship strategies and techniques.  3.5 Creative negotiation skills.  3.6 Change management and continuous improvement concepts. | 3.2 Communicating to actively listen and to ask questions of others in a constructive way. 3.3 Using critical thinking pathway to formulate and ask relevant questions and come up with appropriate answers. 3.4 Performing assimilation and accommodation skills to interpret and distil key information of relevance to a given situation. 3.5 Assessing and measuring the extent of effectiveness and efficiency of the systems, processes and procedures in the workplace. 3.6 Communicating practical insights on improving workplace conditions |

| VARIABLES                         | RANGE  |
|-----------------------------------|--|
| Effectiveness and efficiency      | May include;   |
| ,                                 | 1.1 Developing a more efficient way of doing                                     |
|                                   | something  |
|                                   | 1.2 Developing a new idea  |
|                                   | 1.3 Developing and improving products and services                               |
|                                   | 1.4 Enhancing skills and career opportunities                                    |
|                                   | 1.5 Enhancing the physical environment   |
|                                   | 1.6 Financial benefit     1.7 Greater personal satisfaction                      |
|                                   | 1.8 Improving interpersonal relationships  |
|                                   | 1.9 Evaluating overall workplace conditions                                      |
| 2. Curiosity and critical inquiry | May include:   |
|                                   | 2.1 Accuracy   |
|                                   | 2.2 Breadth  |
|                                   | 2.3 Clarity  |
|                                   | 2.4 Depth  |
|                                   | 2.5 Emotion  |
|                                   | 2.6 Fairness   |
|                                   | 2.7 Logic  |
|                                   | 2.8 Meaning  |
|                                   | 2.9 Planning   |
|                                   | 2.10 Attention   |
|                                   | 2.11 Precisio  |
|                                   | 2.12 Relevance   |
|                                   | 2.13 Significance  |
|                                   | 2.14 Social engagement   |
|                                   | 2.15 Society   |
|                                   | 2.16 Style   |
|                                   | 2.17 Growth mindset  |
|                                   | 2.18 Positive communication  |
|                                   | 2.19 Positive negotiation  |
|                                   | 2.20 Workplace conditions  |
| O. Duratical settings.            | 2.21 Appreciative inquiry methods  |
| 3. Practical action plans         | May include:   |
|                                   | 3.1 Insights on continuous improvement   |
|                                   | 3.2 Creative strategies and techniques for becoming better at work and real life |
|                                   |  |
|                                   | 3.3 Career plans 3.4 Challenging workplace policies, procedures and              |
|                                   | protocols  |
|                                   | 3.5 Specifying plans for change and adapting to the                              |
|                                   | demands of the contemporary workforce  |
|                                   | demands of the contemporary worklords  |

| VARIABLES | RANGE   |
|-----------|---|
|           | 3.6 Challenges in negotiating with stakeholders and teams |
|           | 3.7 Change management, innovation and knowledge creation  |
|           | 3.8 Contractual agreements                                |
|           | 3.9 Extreme time pressure or non-negotiable deadlines     |
|           | 3.10 Financial limitations                                |
|           | 3.11 Procedures determined by laws or other               |
|           | regulations   |
|           | 3.12 Safety issues  |
|           | 3.13 When others are totally closed to new ideas          |
|           | 3.14 Acknowledging shared responsibility                  |
|           | 3.15 Adopting a positive 'can do' attitude                |
|           | 3.16 Following up on practical details                    |
|           | 3.17 Pro-actively seeking information                     |
|           | 3.18 Suggesting a new approach                            |
|           | 3.19 Talking to others about possible answers             |
|           | 3.20 Constraints of the broader context and               |
|           | environment   |
|           | 3.21 Overall goal - what needs to be achieved             |
|           | 3.22 Personal hopes and expectations                      |

| Critical aspects of Competency | Assessment requires evidence that the candidate:  1.1 Evaluated the effectiveness and efficiency of workplace systems, processes and procedures.  1.2 Modelled the conscious process of critical inquiry to get new insights that s/he can get in formulating action plans on continuous improvement in the workplace and real-life  1.3 Practiced the habit of critical inquiry and curiosity in the workplace  1.4 Shown a thorough knowledge and understanding of how critical thinking impacts on individual lives, the broader community and work situations.  1.5 Developed practical action plans for improving   |
|--------------------------------|--|
| 2. Resource                    | workplace conditions.  2.1 Interactions with specific challenges and situations to   |
| Implications                   | demonstrate the application of critical thinking (this would usually involve interactions with others).  |
| 3. Methods of Assessment       | 3.1 Direct questioning combined with review of portfolios of evidence and third-party workplace reports of on-the-job performance by the candidate 3.2 Evaluation of a candidate blog exploring different ideas and questions 3.3 Review of candidate response to scenarios that allow the candidate to apply critical thinking techniques to a life or work situation, and to demonstrate ability to portray curiosity and exploration of new concepts 3.4 Evaluation of candidate response to the challenge of adopting different perspectives on a situation, and ability to both develop and respond to questions from those perspectives 3.5 Observation of the candidate participating in a group problem-solving session 3.6 Oral or written questioning to assess knowledge of typical blockers to the critical thinking process. 3.7 Life Narrative Inquiry to reflect life stories that reflect how critical thinking and problem solving is applied in the lives. |
| Context for     Assessment     | 4.1 In all workplace, it may be appropriate to assess this unit concurrently with relevant teamwork or operation units.  |

UNIT OF COMPETENCY : CONTRIBUTE TO THE PRACTICE OF SOCIAL

JUSTICE IN THE WORKPLACE

UNIT CODE : 500311404

UNIT DESCRIPTOR : This unit covers ways and means to assume active

roles in resolving local and global challenges and to become proactive contributors to a more peaceful and

sustainable world.

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDG<br>E   | REQUIRED SKILLS  |
|--|--|---|--|
| 1. Update self on local, national and global trends/ issues in the workplace | regularly scanned/ monitored for trends and issues relevant to human rights, gender equality, promotion of culture of peace and nonviolence, global citizenship and appreciation of cultural diversity.  1.2 Knowledge and understanding of local, national and global issues and their interconnectedne ss and interdependency are acquired.  1.3 Notable issues and trends are critically examined and discussed with peers, colleagues, or family members | 1.1Local, national and global systems and structures 1.2Issues affecting interaction and connectedness of communities at local, national and global levels 1.3Underlying assumptions and power dynamics (politics, understanding political system, social structures, labor relations, human right) | 1.1 Monitoring trends and issues relevant to human rights, gender equality, culture of peace, global citizenship, and cultural diversity using different media platforms  1.2 Analyzing trends and issues relevant to human rights, gender equality, culture of peace, global citizenship, and cultural diversity  1.3 Engaging in discourse about the local, national and global issues |

| ELEMENT   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDG<br>E  | REQUIRED SKILLS  |
|---|--|--|--|
| 2. Relate local and global trends to workplace context      | 2.1 Local events are reflected on for implications in one's own situation and in the external global environment.  2.2 Sense of belonging to a common humanity, sharing values and responsibilities are developed.  2.3 Attitudes of empathy, solidarity and respect for differences and diversity are strengthened. | 2.1 Different levels of human identity according to Amber Mayer (2015) 2.2 Different communities people belong to and how these are connected 2.3 Difference and respect for cultural diversity                        | 2.1 Recognizing differences and commonalities among people 2.2 Strengthening attitudes of empathy, solidarity and respect for diversity 2.3 Connecting local issues to global trends, and vice versa.  |
| 3. Engage and take actions on workplace issues and concerns | 3.1 Effective and responsible actions at local, national and global levels are identified. 3.2 Motivation and willingness to take necessary actions are developed. 3.3 Attitude of "thinking globally and acting locally" is practiced.  | 3.1 Actions that can be taken individually and collectively 3.2 Ethically responsible behaviour 3.3 Importance and benefits of civic engagement 3.4 Strategies and techniques of "thinking globally and acting locally | 3.1 Employing appropriate actions to address workplace issues involving national and global trends 3.2 Showing concern and willingness to take part in the development efforts to discuss workplace issues and concerns 3.3 Applying the attitude of "thinking globally and acting locally" in the workplace |

| VARIABLE                             | RANGE  |
|--------------------------------------|--|
| 1. Media                             | May include but not limited to: 1.1 Print media 1.2 Broadcast media 1.3 Internet and social media  |
| 2. Scanning/Monitoring               | May include but not limited to: 2.1 Sourcing from key informants 2.2 Conversation with clients 2.3 Man-on-the-street conversation 2.4 Scanning print and broadcast media |
| 3. Local, national and global issues | May include but not limited to: 3.1 Poverty 3.2 Unemployment 3.3 Global warming 3.4 Safety, security, and well-being   |

| Critical aspects of     Competency | Assessment requires evidence that the candidate:  1.1 Demonstrated ability and attitude to keep oneself updated of relevant |
|------------------------------------|---|
|                                    | issues/trends   |
|                                    | 1.2 Demonstrated ability to think and act based on one's principles and values  |
|                                    | 1.3 Demonstrated a holistic/global outlook on internal and external events in the workplace                                 |
| 2. Resource                        | The following resources should be provided:   |
| Implications                       | 2.1 Access to workplace and resources   |
|                                    | 2.2 Case studies  |
| 3. Methods of                      | Competency in this unit may be assessed through:  |
| Assessment                         | 3.1 Demonstration or simulation with oral questioning   |
|                                    | 3.2 Case problems involving global and local issues   |
|                                    | 3.3 Third-party report  |
| 4. Context for                     | Competency assessment may occur in workplace or any   |
| Assessment                         | appropriately simulated environment   |

UNIT OF COMPETENCY : MANAGE INNOVATIVE WORK INSTRUCTIONS

UNIT CODE : 500311405

**UNIT DESCRIPTOR**: This unit covers the knowledge, skills and attitudes required

to sustain and develop a workplace environment in which improvement, innovation and learning are promoted and

reinforced

| ELEMENTS   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED SKILLS  |
|--|---|--|--|
| Review and analyze existing workplace practices  | 1.1 Current instructions and strategies to perform tasks in the workplace are reviewed 1.2 Climate for innovation at the organizational level is defined 1.3 Innovation drivers in the workplace are identified | <ul> <li>1.1 Four drivers of innovation according to Gallup Management Journal (2007)</li> <li>1.2 Contextual variables related to innovative practices in the organization</li> <li>1.3 The nine dimensions of innovation climate (Isaksen &amp; Isaksen, 2018)</li> <li>1.4 Types of Innovation identified by Gopalakrishnan and Damanpour (1997)</li> </ul> | 1.1 Investigating the organizational needs in the innovation process  1.2 Defining current organizational innovative practices  1.3 Linking innovation to contextual variables in the organization |
| 2. Examine opportunitie s for continuous improvemen t and innovation of practices in the workplace | 2.1 Effectiveness of innovative practices in the workplace is determined 2.2 <i>Innovative</i> behaviors of leaders or managers in the organization are assessed  | 2.1 Determinants of innovative behavior by Scott and Bruce (1992) 2.2 Four principles of innovation according to Gallup Management Journal (2007)  | 2.1 Evaluating organizational innovative practices 2.2 Gauging innovative behaviors of the leaders and managers in the organization 2.3 Deliberating opportunities and                             |

| ELEMENTS   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED SKILLS   |
|--|---|---|---|
|  | 2.3 Driving principles of innovation are discussed  |   | challenges in implementing innovation   |
| 3. Implement innovative ways in the conduct of usual workplace practices | 3.1. Innovative behaviors in the workplace are performed 3.2. Innovative climate in the workplace is maintained 3.3. Adoption or modification of new ideas relevant to the organizational needs is achieved | 3.1 Determinants of innovative behavior by Scott and Bruce (1992) 3.2 The nine dimensions of innovation climate (Isaksen & Isaksen, 2018) 3.3 Techniques in implementing innovative change in the workplace | 3.1 Developing risk management techniques and control systems 3.2 Evaluating impact of changes and developing action plans 3.3 Demonstrating strategies and techniques in managing changes in the workplace |

| VARIABLE          | RANGE   |
|-------------------|---|
| novation          | include:  |
|                   | 1.1 Products versus processes   |
|                   | 1.2 Radical versus incremental  |
|                   | 1.3 Technical versus administrative   |
| ovative behaviors | include:  |
|                   | 2.1 Always generate creative ideas or new solutions                             |
|                   | 2.2 Exploring and secure funds or resources required for implementing new ideas |
|                   | 2.3 Establishing adequate plans and schedules for implementing new ideas        |
|                   | 2.4 Contributing suggestions or approaches for others' creative ideas           |

| Critical aspects of        | Assessment requires evidence that the candidate:  |  |
|----------------------------|---|--|
| Competency                 | <ul> <li>1.1 Analyzed and evaluated systems and performance in key areas of the organization and identify opportunities for improvement, seeking advice from experts as appropriate</li> <li>1.2 Promoted the value of creativity, innovation and sustainability and recognize successes</li> <li>1.3 Supported the testing and trialing of new ideas and undertake risk management and costbenefit analysis for options</li> <li>1.4 Planned for and implemented improvements using organization's processes for approvals, project management and change management</li> <li>1.5 Facilitated effective contributions to and communications about continuous improvement and innovation</li> <li>1.6 Captured insights, experiences and ideas for improvements and incorporate them into the organization's knowledge management systems and future planning.</li> </ul> |  |
| 2. Resource                | The following resources should be provided:   |  |
| Implications               | 2.1 Impact evaluation materials (guide and form)  |  |
| Methods of     Assessment  | Competency in this unit may be assessed through: 3.1 Interview 3.2 Written Evaluation 3.3 Case analysis   |  |
| Context for     Assessment | 4.1 Competency may be assessed individually in the actual workplace or simulation environment in TESDA accredited institutions.   |  |

UNIT OF COMPETENCY : MANAGE AND EVALUATE USAGE OF INFORMATION

UNIT CODE : 500311406

UNIT DESCRIPTOR : This unit of competency covers the knowledge, skills and

attitudes required to support.

| ELEMENT                                 | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|---|--|--|---|
| 1. Review information needs and sources | <ul> <li>1.1. The <i>information</i> needs of individuals/teams are determined and the sources are identified.</li> <li>1.2. Information held by the organisation is reviewed to determine suitability and accessibility.</li> <li>1.3. Plans are prepared to obtain information that is not available or accessible within the organization.</li> </ul>         | <ul> <li>1.1. Analysis and display techniques</li> <li>1.2. Information evaluation issues</li> <li>1.3. Information storage requirements and methods</li> <li>1.4. Reporting procedures of the organisation</li> </ul> | 1.1 Analysing record information 1.2. Communicating effectively 1.3. Disseminating information 1.4. Presenting information  |
| 2. Collect and analyze information      | <ul> <li>2.1 Collection of information is interpreted timely and relevant to the needs of individuals/teams.</li> <li>2.2 Information is collected in formal suitable for analysis, interpretation and dissemination.</li> <li>2.3. Information is analyzed to identify relevant trends and developments in terms of the needs for which is acquired.</li> </ul> | 2.1. Information collection, collation 2.2. Analysis and display techniques 2.3. Information evaluation issues 2.4. Information storage requirements and methods 2.5. Reporting procedures of the organisation         | 2.1. Collecting and collating informatio n 2.2. Analysing record informatio n 2.3. Communic ating effectively 2.4. Dissemina ting informatio n 2.5. Presenting informatio n |
| 3. Use management                       | 3.1 Management information systems   | 3.1 Analysis and display   | 3.1 Analysing record  |

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS   |
|--|---|---|--|
| information<br>systems                         | are used to store and retrieve data for decision making.  3.2 Technology available in the work area/ organisation is used to manage information.  3.3 Recommendations for improving the information system are submitted to designated persons/ groups.   | techniques 3.2 Information collection, collation 3.3 Information evaluation issues 3.4 Information storage requirements and methods 3.5 Reporting procedures of the organisation                          | information 3.2 Collecting and collating information 3.3 Communicati ng effectively 3.4 Disseminating information 3.5 Presenting information 3.6 Using management information systems to store and retrieve data                       |
| 4. Report and disseminate analyzed information | <ul> <li>4.1 The results of information gathering, analysis and synthesis are reported within specified time frames and to the standard defined by the organisation.</li> <li>4.2 The results of information gathering, analysis and synthesis are reported so they can be inputs to policy development and organisation decision making.</li> <li>4.3 Information which is gathered is disseminated to appropriate personnel within the specified timeframe</li> </ul> | 4.1 Analysis and display techniques 4.2 Information collection, collation 4.3 Information evaluation issues 4.4 Information storage requirements and methods 4.5 Reporting procedures of the organisation | 4.1 Analysing record information 4.2 Collecting and collating information 4.3  Communicati ng effectively 4.4 Disseminating information 4.5 Presenting information 4.6 Using management information systems to store and retrieve data |

| VARIABLE                 | RANGE  |
|--------------------------|--|
| 1. Information           | May include:                                     |
|                          | 1.1. Routine and complex reports and submissions |
|                          | 1.2. Briefing notes                              |
|                          | 1.3. Ministerial                                 |
|                          | 1.4. Proposals                                   |
|                          | 1.5. Project plans                               |
|                          | 1.6. Articles and promotional material           |
| 2. Collection techniques | 2.1 Collection techniques may include:           |
| or methods               | 2.1.1 Research                                   |
|                          | 2.1.2 Surveys                                    |
|                          | 2.1.3 Literature search                          |
|                          | 2.1.4 Interviews                                 |
|                          | 2.1.5 Data bases                                 |
|                          | 2.1.6 Observation                                |
|                          | 2.2 Collection methods may include:              |
|                          | 2.2.1 Indexing                                   |
|                          | 2.2.2 linking                                    |
|                          | 2.2.3 Sorting                                    |
|                          | 2.2.4 Comparing                                  |
|                          | 2.2.5 Categorizing                               |
|                          | 2.2.6 Integrating                                |
| 3. Analysis              | May include:                                     |
|                          | 3.1. application of statistical methods          |
|                          | 3.2. mathematical calculations                   |
|                          | 3.3. critical analysis                           |
|                          | 3.4. problem solving                             |
| 4. Management            | May include:                                     |
| information systems      | 4.1. Computers                                   |
|                          | 4.2. Communication channels                      |
|                          | 4.3. Records management                          |
|                          | 4.4. Procedures                                  |
|                          | 4.5. Manuals                                     |
|                          | 4.6. Protocol                                    |
|                          | 4.7. Legislation                                 |
|                          | 4.8. Guidelines and awards                       |
|                          | 4.9. Organizational                              |
|                          | 4.10. Legal and policy materials                 |

| 1. Critical aspects of Competency | Assessment requires evidence that the candidate:  1.1 Identified information needs and sources 1.2 Collected and analyzed information 1.3 Determined the correct / preventive action 1.4 Used management information systems 1.5 Record and support information  These aspects may be best assessed using a range of scenarios what ifs as a stimulus with a walk-through forming part of the response. These assessment activities should include a range of problems, including new, unusual and improbable situations that may have happened. |  |
|-----------------------------------|--|--|
| 2. Resource Implications          | The following resources should be provided:  2.1 Evidence of competent performance should be obtained by observing an individual in an information management role within the workplace or operational or simulated environment  |  |
| 3. Methods of Assessment          | through: 3.1. Written Test 3.2. Interview  The unit will be assessed in a holistic manner as is practical and may be integrated with the assessment of other relevant units of competency. Assessment will occur over a range of situations, which will include disruptions to normal, smooth operation. Simulation may be required to allow for timely assessment of parts of this unit of competency. Simulation should be based on the actual workplace and will include walk through of the relevant competency components.                  |  |
| Context for     Assessment        | 4.1. In all workplace, it may be appropriate to assess this unit concurrently with relevant teamwork or operation units.   |  |

UNIT OF COMPETENCY: LEAD IN IMPROVEMENT OF OCCUPATIONAL SAFETY

AND HEALTH (OSH) PROGRAMS, POLICIES AND

**PROCEDURES** 

UNIT CODE : 500311407

**UNIT DESCRIPTOR**: This unit covers the knowledge, skills and attitudes required

to assess Occupational Safety and Health (OSH) practices and programs, recommend OSH program improvement initiatives, and implement recommended improvements on Occupational Safety and Health (OSH) Programs,

Procedures and Policies

| ELEMENT  | PERFORMAN CE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED SKILLS                                    |
|--|--|---|--|
| 1. Assess Occupationa I Safety and Health (OSH) practices and programs | 1.1 OSH practices and programs are reviewed based on workplace policies and procedures 1.2 Appropriate personnel or OSH reference guides are consulted for proper guidance based on workplace policies and procedures 1.3 Current practices and programs are evaluated based on acceptable level of OSH work standards | 1.1 OSH practices<br>and programs<br>workplace policies<br>and procedures<br>1.2 OSH<br>reference guides<br>1.3 OSH work<br>standards | 1.1 Critical thinking skills 1.2 Evaluating skills |

| ELEMENT  | PERFORMAN CE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED SKILLS   |
|--|--|---|---|
| 2. Recommend OSH program improvement initiatives   | 2.1 OSH work improvement initiatives are identified that are relevant with the workplace scenario 2.2 OSH program improvement plans are organized based on workplace policies and procedures 2.3 OSH program improvement plans are presented based on workplace policies and procedures  | 2.1. OSH Programs 2.2. OSH work improveme nt initiatives                            | 2.1 Presentation Skills 2.2 Communication skills 2.3 Collaborating skills 2.4 Critical thinking skills 2.5 Observation skills |
| 3. Implement recommend ed improvement s on Occupationa I Safety and Health (OSH) Programs, Procedures and Policies | improvements on OSH work improvement initiatives are communicated based on workplace policies and procedures 3.2 Concern personnel are guided in accordance with workplace policies and procedures 3.3 Implementation of the approved OSH initiatives are monitored in accordance with workplace policies and procedures 3.4 Implementation of approved OSH initiatives are evaluated based on workplace policies and procedures | 3.1 Coaching Concepts 3.2 OSH work improvement initiatives 3.3 Supervisory Concepts | 3.1 Monitoring Skills 3.2 Evaluation Skills 3.3 Auditing Skills 3.4 Coaching Skills 3.5 Supervisory Skills                    |

| VARIABLE         | RANGE   |  |
|------------------|---|--|
| 1. OSH Practices | May include but not limited to:                                 |  |
| and Programs     | 1.1 Planning, implementation and maintenance of                 |  |
|                  | manufacturing plants  |  |
|                  | 1.2 Work-physiological, psychological, ergonomic and            |  |
|                  | hygienic practices and programs                                 |  |
|                  | 1.3 First aid within the workplace                              |  |
|                  | 1.4 Safety inspection practices                                 |  |
| 2. OSH Reference | May include:  |  |
| Guides           | 2.1 Occupational Safety and Health Standards Book               |  |
|                  | 2.2 OSHA Safety Bulletins and Magazines                         |  |
|                  | 2.3 Equipment Safety Operating Instructions                     |  |
|                  | 2.4 Established National Safety Management Books                |  |
|                  | 2.5 Credible OSH Web-sites                                      |  |
|                  | 2.6 Safety Solution Guide Books and Handbooks                   |  |
| 3. OSH Work      | May include but not limited to:                                 |  |
| Improvemen       | 3.1 Eliminate the hazard altogether (i.e., get rid of the       |  |
| t Initiatives    | dangerous machine)  |  |
|                  | 3.2 Isolate the hazard from anyone who could be harmed          |  |
|                  | (i.e., keep the machine in a closed room and operate it         |  |
|                  | remotely; barricade an unsafe area off)                         |  |
|                  | 3.3 Substitute the hazard with a safer alternative (i.e.,       |  |
|                  | replace the machine with a safer one)                           |  |
|                  | 3.4 Use administrative controls to reduce the risk (i.e., train |  |
|                  | workers how to use equipment safely; train workers              |  |
|                  | about the risks of harassment; issue signage)                   |  |
|                  | 3.5 Use engineering controls to reduce the risk (i.e., attach   |  |
|                  | guards to the machine to protect users)                         |  |
|                  | 3.6 Use personal protective equipment (i.e., wear gloves        |  |
|                  |   |  |
|                  | and goggles when using the machine)                             |  |

| Critical aspects of Competency | <ul> <li>Assessment requires evidence that the candidate:</li> <li>1.1. Consult appropriate personnel or OSH reference guides for proper guidance based on workplace policies and procedures</li> <li>1.2. Evaluate current practices and programs based on acceptable level of OSH work standards</li> <li>1.3. Identify OSH work improvement initiatives that are relevant with the workplace scenario</li> <li>1.4. Present OSH program improvement plans based on workplace policies and procedures</li> <li>1.5. Communicate approved improvements on OSH work program initiatives based on workplace policies and procedures</li> <li>1.6. Monitor implementation of the approved OSH initiatives in accordance with workplace policies and procedures</li> </ul> |
|--------------------------------|---|
|                                | Evaluate implementation of approved OSH initiatives based on workplace policies and procedures  |
| 2. Resource Implications       | The following resources should be provided: 2.1 Workplace or assessment location 2.2 OSH personal records 2.3 PPE 2.4 Health records  |
| 3. Methods of Assessment       | Competency in this unit may be assessed through: 3.1 Portfolio Assessment 3.2 Interview 3.3 Case Study/Situation 3.4 Observation/Demonstration and oral questioning   |
| Context for     Assessment     | 4.1 Competency may be assessed in the work place or in a simulated work place setting   |

UNIT OF COMPETENCY : LEAD TOWARDS IMPROVEMENT OF

**ENVIRONMENTAL WORK PROGRAMS, POLICIES** 

AND PROCEDURES

UNIT CODE : 500311408

UNIT DESCRIPTOR: This unit covers the knowledge, skills and attitudes

required in assessing environmental work practices and standards, recommending environmental work improvement initiatives and implementing recommended

environmental improvements

| ELEMENTS  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS  |
|---|--|---|---|
| 1. Assess environmental work practices and programs         | <ul> <li>1.1 Environmental practices and programs are reviewed based on workplace policies</li> <li>1.2 Appropriate personnel or environmental reference guides are consulted for proper guidance based on workplace policies*</li> <li>1.3 Current practices and programs are evaluated based on acceptable level of environmental work standards*</li> </ul> | 1.1 Environmental Practices 1.2 Environmental Reference Guides 1.3 Corrective Action and Follow-up 1.4 Relevant environmental experts 1.5 Re-Training Needs 1.6 Energy and Healthy Habits | 1.1 Critical thinking 1.2 Problem solving 1.3 Observation Skills 1.4 Training Delivery Skills   |
| 2. Recommend environmental program improvements initiatives | 2.1. Environment practices opportunities are Identified that are relevant with the workplace scenario 2.2. Environmental program improvement plans are organized based on workplace policies and procedures* 2.3. Environmental program improvement plans  | 2.1 Environmental Practices and Standards 2.2 Mitigation Requirements   | 2.1. Presentation Skills 2.2 Critical thinking 2.3. Problem Solving 2.4 Observation Skills 2.5 Training Delivery Skills 2.6 Cost-Benefit Analysis |

| ELEMENTS   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS   |
|--|--|---|--|
|  | are presented<br>based on<br>workplace policies<br>and procedures*   |   |  |
| 3. Implement recommended improvements on environmental programs, policies and procedures | improved improvements on environmental work program initiatives are promoted based on workplace policies and procedures 3.2 Implementation of the approved environmental initiatives are monitored in accordance with workplace policies and procedures 3.3. Implementation of approved environmental initiatives are evaluated based on workplace policies and procedures | 3.1 Environmen tal Work Initiatives 3.2 Communica tion Strategies 3.3 Environmen tal inspection and Monitoring Technique 3.4 Notification Requireme nts | 3.1 Inspection Skills 3.2 Critical thinking 3.3 Problem Solving 3.4 Observation Skills |

| VARIABLE                   | RANGE   |
|----------------------------|---|
| 1. Environmental Practices | May include:  |
| and Programs               | 3.1 Utilization of Energy, Water, Fuel              |
|                            | 3.2 Segregation Practices                           |
|                            | 3.3 Waste Disposal and Reuse                        |
|                            | 3.4 Saving Resources                                |
|                            | 3.5 Waste Collection                                |
|                            | 3.6 Usage of Hazardous Materials                    |
|                            | 3.7 Chemical Application                            |
|                            | 3.8 Equipment Operation                             |
|                            | 3.9 Dewatering and Discharging                      |
|                            | 3.10 Surface Disturbance                            |
|                            | 3.11 Periodic Inspection                            |
|                            | 3.12 Resource Storage and Handling                  |
| 2. Environmental Reference | May include:  |
| Guides                     | 2.1 Air Emission and Ambient Air Quality Guidelines |
|                            | 2.2 Energy Conservation Guidelines                  |
|                            | 2.3 Wastewater and Ambient Water Quality Guidelines |
|                            | 2.4 Water Conservation Guidelines                   |
|                            | 2.5 Hazardous Materials Management                  |
|                            | 2.6 Waste Management                                |
|                            | 2.7 Noise   |
|                            | 2.8 Contaminated Land                               |
|                            | 2.9 Cultural Conservation Guides                    |
| 3. Environmental Work      | May include:  |
| Program Initiatives        | 3.1 Low Energy Lighting                             |
|                            | 3.2 Water Reduction initiatives                     |
|                            | 3.3 Holding Employee Awareness event                |
|                            | 3.4 Recycling Waste Materials                       |
|                            | 3.5 Unplugging power converters overnight           |
|                            | 3.6 Tree-Planting                                   |
|                            | 3.7 Wild-life conservation                          |

| 1. Critical aspects of | Assessment requires evidence that the candidate:   |
|------------------------|--|
| Competency             | 1.1 Consulted appropriate personnel or environmental   |
|                        | reference guides for proper guidance based on workplace policies*  |
|                        | 1.2. Evaluated current practices and standards based   |
|                        | acceptable level of environmental work standards  1.3. Organized environmental standard improvement      |
|                        | plans based on workplace policies and procedures   |
|                        | 1.4. Presented environmental standard improvement  |
|                        | plans based on workplace policies and procedures*  1.5. Promoted approved environmental work initiatives |
|                        | based on workplace policies and procedures   |
|                        | 1.6. Evaluated the implementation of approved  |
|                        | environmental improvements based on workplace policies and procedures                                    |
| 2. Resource            | The following resources should be provided:  |
| Implications           | 2.1 Workplace/Assessment location  |
|                        | 2.2 Legislation, policies, procedures, protocols and   |
|                        | local ordinances relating to environmental protection  |
|                        | 2.3 Case studies/scenarios relating to environmental   |
|                        | protection   |
| 3. Methods of          | Competency in this unit may be assessed through:   |
| Assessment             | 3.1 Written/ Oral Examination  |
|                        | 3.2 Interview/Third Party Reports  |
|                        | 3.3 Portfolio (citations/awards from GOs and NGOs,   |
|                        | certificate of training – local and abroad)  3.4 Simulations and role-plays                              |
| 4. Context for         | 4.1 Competency may be assessed in actual workplace   |
| Assessment             | or at the designated TESDA center.   |

UNIT OF COMPETENCY: SUSTAIN ENTREPRENEURIAL SKILLS

UNIT CODE: 500311409

**UNIT DESCRIPTOR:** This unit covers the outcomes required to update and continue

one's professional development along entrepreneurship, including applying such growth in skills toward expanding the

enterprise and developing its work force.

| ELEMENT                          | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|----------------------------------|---|--|--|
| 1. Enhance one's business skills | 1.1 Entrepreneurial skills development needs are identified and responded to promptly.  1.2 Market trends are monitored, anticipated and taken advantage of where feasible.  1.3 New technologies, products and processes are included/utilized where advantageous to the enterprise.  1.4 Constant dialog/linkages with other entrepreneurs/pe ers and stakeholders are maintained  1.5 Circulation and participation in business fora, meetings, conventions and exhibits are maintained. | <ul> <li>1.1 Business models and strategies</li> <li>1.2 Types and categories of businesses</li> <li>1.3 Business internal controls</li> <li>1.4 Market Trends</li> <li>1.5 Relevant national and local legislation and regulations</li> <li>1.6 Basic quality control and assurance concepts</li> </ul> | <ul> <li>1.1 Basic bookkeeping/accounting skills</li> <li>1.2 Communication skills</li> <li>1.3 Building relations with customer and employees</li> <li>1.4 Building competitive advantage of the enterprise</li> <li>1.5 Networking and Linkaging skills</li> </ul> |

| ELEMENT                             | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS  |
|-------------------------------------|--|---|---|
| 2. Manage entrepreneurial practices | 2.1 Ideas and comments for improvements are sought from workers and clients.  2.2 Staff/workers are encouraged and supported in their skills development and enhancement.  2.3 A culture of continuous improvement is fostered within the enterprise.  2.4 Innovations on the existing lines of products and services are encouraged | 2.1 Public relations concepts 2.2 Basic product promotion strategies 2.3 Basic market and feasibility studies 2.4 Basic business ethics | 2.1 Building customer relations 2.2 Individual marketing skills 2.3 Using basic advertising (posters/ tarpaulins, flyers, social media, etc.) |
| 3 Expand markets and clientele      | 3.1 Enterprise is built up and sustained through judicious control of cash flows. 3.2 Profitability of enterprise is ensured though appropriate internal controls. 3.3 Unnecessary or lower-priority expenses and purchases are avoided. 3.4 New markets and clients are identified based on current market trends                   | 3.1 Basic costbenefit analysis 3.2 Basic financial management 3.3 Basic financial accounting 3.4 Business internal controls             | 3.1 Setting business priorities and strategies 3.2 Interpreting basic financial statements 3.3 Preparing business plans                       |

| VARIABLE                  | RANGE   |
|---------------------------|---|
| 1.Entrepreneurial skills  | May include:  |
|                           | 1.1. Financial management skills  |
|                           | <ul><li>1.2. People management skills</li><li>1.3. Operations management skills</li></ul> |
|                           | 1.4. Business acumen  |
| 2. Business operations    | May include:  |
|                           | 2.1 Purchasing  |
|                           | 2.2 Accounting/Administrative work  |
|                           | 2.3 Production/Operations/Sales   |
| 3. Internal controls      | May include:  |
|                           | 3.1 Accounting systems  |
|                           | 3.2 Financial statements/reports  |
|                           | 3.3 Cash management   |
| 4. Continuous improvement | 3.4 Managing property, plant and equipment  |
| 4. Continuous improvement | May include:  |
|                           | 4.1 Quality management systems (PDCA, ISO 9001,TQM, Six-Sigma, etc.)                      |
|                           | 4.2 Client feedback systems   |
|                           | 4.3 Quality assurance/Quality control systems   |
|                           | T.5 Quality assurance/Quality control systems   |

| 1. Critical aspects of      | Assessment requires evidence that the candidate:   |
|-----------------------------|--|
| competency                  | 1.1 Demonstrated enhancement of one's  |
|                             | entrepreneurial skills through   |
|                             | performance of business, supervisor  |
|                             | evaluation, worker and client testimony  |
| 2. Resource Implications    | The following resources should be provided:  |
|                             | 2.1 Interview guide for entrepreneurs, enterprise  |
|                             | workers and third parties  |
|                             | 2.2 Materials and location relevant to the proposed  |
|                             | activity and tasks   |
|                             |  |
| 3. Methods of               | Competency in this unit may be assessed through:   |
| 3. Methods of<br>Assessment | Competency in this unit may be assessed through: 3.1 Written report  |
|                             |  |
|                             | 3.1 Written report   |
|                             | 3.1 Written report 3.2 Written examination   |
|                             | <ul><li>3.1 Written report</li><li>3.2 Written examination</li><li>3.3 Demonstration/observation with oral questioning</li></ul>   |
|                             | <ul><li>3.1 Written report</li><li>3.2 Written examination</li><li>3.3 Demonstration/observation with oral questioning</li><li>3.4 Portfolio assessment with interview</li></ul>   |
| Assessment                  | <ul> <li>3.1 Written report</li> <li>3.2 Written examination</li> <li>3.3 Demonstration/observation with oral questioning</li> <li>3.4 Portfolio assessment with interview</li> <li>3.5 Third-party report</li> <li>4.1 Competency may be assessed in workplace or in a simulated workplace setting</li> </ul>   |
| Assessment  4. Context of   | <ul> <li>3.1 Written report</li> <li>3.2 Written examination</li> <li>3.3 Demonstration/observation with oral questioning</li> <li>3.4 Portfolio assessment with interview</li> <li>3.5 Third-party report</li> <li>4.1 Competency may be assessed in workplace or in a simulated workplace setting</li> <li>4.2 Assessment shall be observed while tasks are</li> </ul> |
| Assessment  4. Context of   | <ul> <li>3.1 Written report</li> <li>3.2 Written examination</li> <li>3.3 Demonstration/observation with oral questioning</li> <li>3.4 Portfolio assessment with interview</li> <li>3.5 Third-party report</li> <li>4.1 Competency may be assessed in workplace or in a simulated workplace setting</li> </ul>   |

### **COMMON COMPETENCIES**

UNIT OF COMPETENCY: MAINTAIN HOSPITALITY INDUSTRY KNOWLEDGE

UNIT CODE : TRS141208

**UNIT DESCRIPTOR** : This unit deals with the skills and knowledge required to maintain

hospitality industry knowledge in a range of settings within the hotel

and travel industries workplace context.

| ELEMENT   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|---|--|--|---|
| 1. Seek information on the hospitality industry | 1.1 Sources of information on the hotel and travel industries are identified and accessed 1.2 Information on the hotel and travel industries to assist effective work performance within the industries are obtained 1.3 Specific information on relevant sector(s) of work are accessed and updated 1.4 Knowledge of the hotel and travel industries in the correct context to enhance quality of work performance are used Information on other industries to enhance quality of work performance are obtained | 1.2 Sources of industry information 1.3 Different sectors of the hospitality industry and their inter-relationships. | <ul> <li>1.1 Questioning and communication skills</li> <li>1.2 Research skills</li> <li>1.3 Analytical skills</li> <li>1.4 Networking skills</li> <li>1.5 Identifying sources of information</li> </ul> |

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|--|---|--|---|
|  |   | and guidelines that apply to the hotel and travel and travel industries, including the main objectives, requirements and impact on individual staff  |   |
| 2. Source and apply information on legal and ethical issues for the hospitality industry | 2.1 Information on legal issues and ethical issues to assist effective work performance are obtained 2.2 Information on legal ethical issues are reviewed and selected 2.3 Day-to-day hospitality industry activities are conducted in accordance with legal obligations and ethical industry practices | 2.1 Basic research 2.2 Sources of Industry information 2.3 Different sectors of the hospitality industry and their inter- relationships, including a general knowledge of the role and function of the following: food and beverage, front office, food production/ kitchen operations, housekeeping, travel agencies and tour operations 2.4 Quality assurance, quality activities and continuous improvement in the hotel and travel industries and the role of individual staff members within the total quality process 2.5 Role of trade unions and employer groups in the industry | <ul> <li>2.1 Questioning and communication skills</li> <li>2.2 Analytical skills</li> <li>2.3 Networking skills</li> <li>2.4 Ability to research industry information sources</li> <li>2.5 Obtaining information on legal and ethical issues</li> </ul> |

| ELEMENT                     | PERFORMANCE<br>CRITERIA<br>Italicized terms are<br>elaborated in the<br>Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS                       |
|-----------------------------|---|--|--|
| Update hospitality industry | 3.1 A range of opportunities to update general  | 2.6 Environmental responsibilities of the industry, including waste minimization and recycling 2.7 Legislation, regulations and guidelines that apply to the hotel and travel industries, including the main objectives, requirements and impact on individual staff 3.1 Basic Research 3.2 Different sectors of the hospitality industry  | 3.1 Questioning and communication skills |
| knowledge                   | knowledge of the hotel and travel industries are identified and used 3.2 Current issues of concern to the industries are monitored 3.3 Knowledge with customers and colleagues as appropriate and incorporate this into day-to-day work activities are shared and updated | and their inter- relationships, including a general knowledge of the role and function of the following: food and beverage, front office, food production/ kitchen operations, housekeeping, travel agencies and tour operations 3.3 Quality assurance, quality activities and continuous improvement in the hotel and travel industries and the role of individual staff members within the total quality process 3.4 Role of trade unions and employer groups in the industry 3.5 Environmental responsibilities of the industry, including waste minimization and recycling | 3.2 Analytical skills                    |

| ELEMENT | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS |
|---------|--|---|--------------------|
|         |  | 3.6 Legislation, regulations and guidelines that apply to the hotel and travel industries, including the main objectives, requirements and impact on individual staff |                    |

| VARIABLE                 | RANGE  |
|--------------------------|--|
| 1. Source of Information | May include: 1.1 Media 1.2 Reference books 1.3 Libraries 1.4 Unions 1.5 Industry associations 1.6 Industry journals 1.7 Internet 1.8 Information services 1.9 Personal observation and experience 1.10 Colleagues, supervisors and managers 1.11 Industry contacts, mentors and advisors   |
| 2. Information           | <ul> <li>May include:</li> <li>2.1 Different sectors of the hospitality industry, their interrelationships and the services available in each sector</li> <li>2.2 Relationships between tourism and hospitality</li> <li>2.3 Relationships between the hospitality industry and other industries</li> <li>2.4 Industry working conditions</li> <li>2.5 Environmental issues and requirements</li> <li>2.6 Industrial relations issues and major organisations</li> <li>2.7 Career opportunities within the industry</li> <li>2.8 The work ethic required to work in the industry</li> <li>2.9 Industry expectations of staff</li> <li>2.10 Quality assurance.</li> </ul> |
| 3. Other industries      | May include: 3.1 Entertainment 3.2 Food production 3.3 Wine production 3.4 Recreation 3.5 Meetings and events 3.6 Retail   |
| 4. Legal issues          | May include: 4.1 Consumer protection 4.2 Duty of care 4.3 Equal employment opportunity 4.4 Anti-discrimination 4.5 Workplace relations 4.6 Child sex tourism   |

| VARIABLE             | RANGE   |
|----------------------|---|
| 5. Ethical issues    | May include: 5.1 Confidentiality 5.2 Commission procedures 5.3 Overbooking 5.4 Pricing 5.5 Tipping 5.6 Familiarizations                                 |
|                      | 5.7 Gifts and services free of charge 5.8 Product recommendations   |
| 6. Issues of concern | May include: 6.1 Government initiatives 6.2 Emerging markets 6.3 Environmental and social issues 6.4 Labour issues 6.5 Industry expansion or retraction |

| Critical aspects of     Competency | Assessment requires evidence that the candidate:  1.1 Demonstrated ability to source industry information  1.2 Demonstrated knowledge of the hospitality industry, including main roles, functions and inter- relationships of different sectors, with a more detailed knowledge of issues which relate to a specific sector or workplace  1.3 Demonstrated ability in updating hospitality industry knowledge |  |  |
|------------------------------------|--|--|--|
| 2. Resource Implications           | The following resources should be provided: 2.1Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.   |  |  |
| 3. Method of Assessment            | Competency in this unit may be assessed through: 3.1 Case studies 3.2 Observation of practical candidate performance 3.3 Oral and written questions Portfolio evidence 3.4 Problem solving 3.5 Role plays 3.6 Third party reports completed by a supervisor  |  |  |
| 4. Context of Assessment           | 4.1 Competency may be assessed in the actual workplace or at the designated TESDA Accredited Assessment Center.  |  |  |

UNIT OF COMPETENCY: PERFORM CHILD PROTECTION DUTIES RELEVANT TO THE

**TOURISM INDUSTRY** 

UNIT CODE : TRS141209

**UNIT DESCRIPTOR**: This unit deals with skills and knowledge required to understand

the issue of child sexual exploitation by tourists and apply simple protective measures which are applicable for staff

working in the hotel and travel industries.

| ELEMENT   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS   |
|---|---|---|--|
| Identify the issue of sexual exploitation of children by tourists | 1.1 The problem of child sexual exploitation of children by tourists (otherwise known as child-sex tourism) is defined 1.2 The impact of child sexual exploitation on children, communities and the hotel and travel industries is described 1.3 Suspicious behaviours that may be exhibited by child sex tourists are identified | <ul> <li>1.1 Basic research</li> <li>1.2 Preventive measures for sexual exploitation of children by tourists</li> <li>1.3 Child sexual exploitation in tourism destinations</li> <li>1.4 Negative impact of child sexual exploitation in tourism destinations</li> <li>1.5 Awareness of suspicious behaviours which may be exhibited by child sex tourists</li> <li>1.6 Rules, regulations, policies and laws to protect children from sexual exploitation by tourists</li> </ul> | <ul> <li>1.1 Questioning and communication skills</li> <li>1.2 Research skills</li> <li>1.3 Analytical skills</li> <li>1.4 Networking skills</li> <li>1.5 Identifying suspicious behaviors exhibited by child sex tourist</li> </ul> |

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS   |
|--|--|---|--|
| 2.Describe national, regional and international actions to prevent the sexual exploitation of children by tourists | 2.1 The United Nations Convention on the Rights (UNCRC) of the Child and the main UN Articles relating to the rights of all children to be safe from sexual exploitation are located and familiarized 2.2 The national, regional and international initiatives to prevent the sexual exploitation of children by tourists are examined 2.3 Reporting mechanisms if suspicious behaviour is observed are identified | 2.1 Knowledge to communicate to stakeholders 2.2 Actions that can be implemented by staff working in the hotel and travel industries which can prevent the sexual exploitation of children by tourists. 2.3 Child sexual exploitation in tourism destinations 2.4 Negative impact of child sexual exploitation in tourism destinations 2.5 Awareness of suspicious behaviours which may be exhibited by child sex tourists 2.6 Awareness of conventions, rules, regulations, policies and laws to protect children from sexual exploitation by tourists | 2.1 Questioning and communication skills 2.2 Research skillS 2.3 Analytical skills 2.4 Networking skills 2.5 Identifying reporting mechanisms  |
| 3. Describe actions that can be taken in the workplace to protect children from sexual exploitation by tourists    | 3.1 A list of <i>actions</i> that can be taken by staff working in each labor division of the hotel and travel industries are prepared to prevent the sexual exploitation of children by tourists  3.2 The best action   | 3.1 Knowledge to communicate to stakeholders 3.2 Actions that can be implemented by staff working in the hotel and travel industries which can prevent the sexual exploitation of children by tourists  | <ul> <li>3.1 Questioning and communication skills</li> <li>3.2 Research skills</li> <li>3.3 Analytical skills</li> <li>3.4 Networking skills</li> <li>3.5 Preparing list of actions to prevent the sexual exploitation of children by</li> </ul> |

| ELEMENT | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS |
|---------|--|---|--------------------|
|         | that can be taken by a staff for particular situations in preventing the sexual exploitation of children by tourists are selecteD 3.3 Participating in national and regional campaigns to promote greater public awareness and action to prevent child sexual exploitation in tourism destinations | 3.3 Child sexual exploitation in tourism destinations 3.4 Negative impact of child sexual exploitation in tourism destinations 3.5 Awareness of suspicious behaviours which may be exhibited by child sex tourists 3.6 Awareness of conventions, rules, regulations, policies laws to protect children from sexual exploitation by tourists | tourists           |

| VARIABLE   | RANGE   |
|--|---|
| 1. Tourists  | May Include: 1.1 International tourists 1.2 Domestic tourists 1.3 Business travellers 1.4 Expatriates   |
| 2. Child sex tourism   | May Include: 2.1 Child sex tourism 2.2 Child pornography 2.3 Child prostitution 2.4 Child sexual abuse  |
| 3. Suspicious behaviours   | <ul> <li>May Include:</li> <li>3.1 Tourist taking local children to their hotel room, a restaurant/café/bar, a private place or an excursion/outing</li> <li>3.2 Tourist being very affectionate with local children</li> <li>3.3 Tourist touching local children inappropriately</li> <li>3.4 Tourist giving excessive gifts or money to local children</li> <li>3.5 Tourist asking hotel and travel staff where they can locate children for sex</li> <li>3.6 Tourist leaves sexually explicit images of children in their hotel room, or views sexually explicit images of children at an internet café</li> </ul> |
| 4. UN Articles relating to<br>the rights of all children<br>to be safe from sexual<br>exploitation | May Include: 4.1 Specific Articles in the United Nations Convention on the Rights of the Child which refer to child sexual abuse including Articles 19, 34 and 36   |
| 5. National, regional and international initiatives  | May Include: 5.1 Tourism policies and codes 5.2 Rules and regulations 5.3 Legal provisions, national legislation, extraterritorial legislation 5.4 Public education campaigns 5.5 Training for the hotel and travel industries  |

| VARIABLE                | RANGE  |
|-------------------------|--|
| 6. Reporting mechanisms | May Include: 6.1 Reporting to line management at the place of employment 6.2 Local and national reporting hotline phone numbers 6.3 Local authorities 6.4 International police 6.5 Law enforcement websites 6.6 Non-government organizations   |
| 7. Actions              | <ul> <li>May Include:</li> <li>7.1 Being vigilant and aware of suspicious behaviour</li> <li>7.2 Reporting suspicious behaviour through the appropriate channels</li> <li>7.3 Establishing and implementing organizational policies to protect children in the hotel and travel industries</li> <li>7.4 Participating in national and regional campaigns to promote greater public awareness and action to prevent child sexual exploitation in tourism destinations</li> <li>7.5 Sharing information about child protection with family, friends and work colleagues</li> </ul> |

| Critical aspects of     Competency | Assessment requires evidence that the candidate:  1.1 Demonstrated understanding of the critical requirement to protect children from sexual exploitation by tourists  1.2 Demonstrated ability to articulate those behaviours which could be viewed as suspicious and awareness of appropriate reporting mechanisms  1.3 Demonstrated understanding of rules, regulations, legislation, policies and procedures which relate to the prevention of child sexual exploitation in tourism destinations  1.4 Demonstrated ability to outline actions that could be taken by tourism staff in particular labour divisions which could protect children from sexual exploitation by tourists |
|------------------------------------|---|
| 2. Resource Implications           | The following resources should be provided:  2.1 Training and assessment to include access to a real or simulated workplace; and access to workplace customer service standards, procedures, policies, guidelines, tools and equipment and in particular those procedures, policies and guidelines that guide effective complaint resolution  |
| 3. Method of Assessment            | Competency in this unit may be assessed through: 3.1 Oral and written questions 3.2 Case studies 3.3 Observation of candidate performance 3.4 Simulation exercises and role plays 3.5 Problem solving 3.6 Third party reports completed by a supervisor 3.7 Project and assignment work   |
| 4. Context of Assessment           | 4.1 Competency may be assessed in the actual workplace or at the designated TESDA Accredited Assessment Center.   |

UNIT OF COMPETENCY : DEVELOP AND SUPERVISE OPERATIONAL

**APPROACHES** 

UNIT CODE : TRS141210

**UNIT DESCRIPTOR** : This unit deals with the skills and knowledge required to

develop and supervise operational approaches in a range of

settings within the hotel industries.

| ELEMENT                | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|------------------------|--|--|--|
| Communicate work roles | 1.1 Operational plans and objectives to team members are identified, developed and communicated 1.2 Skills of team members to tasks and duties and develop job responsibilities in line with enterprise guidelines are matched 1.3 Requirements of jobs and tasks clearly to team members are communicated | <ul> <li>1.1 Different leadership styles and the characteristics of effective leadership</li> <li>1.2 Principles of teamwork, including characteristics of effective teams, organization of teams, potential team problems and the benefits of effective teamwork</li> <li>1.3 Role and theories of motivation and its application to different workplace contexts</li> <li>1.4 Organizational structure and group dynamics</li> <li>1.5 Legislative issues that impact on team management, including equal employment opportunity, diversity, antidiscrimination and unfair dismissal</li> <li>1.6 Performance appraisal systems and</li> </ul> | 1.1 Questioning and communication skills 1.2 Research skills 1.3 Analytical skills 1.4 Networking skills 1.5 Developing operational plans and objectives |

| ELEMENT       | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS   |
|---------------|---|---|--|
| 2. Coordinate | 2.1 Work plans that   | procedures 1.7 Principles of time management 1.8 Conflict management technique 1.9 Enterprise training requirements and processes 2.1 Different leadership  | 2.1 Questioning and  |
| activities    | establish appropriate targets and task objectives are developed  2.2 Work activities to ensure completion of tasks are prioritized in accordance with work requirements  2.3 Training and learning opportunities into work activities are identified and incorporated  2.4 Clear supervisory and reporting responsibilities in line with organizational requirements are maintained | styles and the characteristics of effective leadership  2.2 Principles of teamwork, including characteristics of effective teams, organization of teams, potential team problems and the benefits of effective teamwork  2.3 Role and theories of motivation and its application to different workplace contexts  2.4 Organizational structure and group dynamics  2.5 Legislative issues that impact on team management, including equal employment opportunity, diversity, antidiscrimination and unfair dismissal  2.6 Performance appraisal | communication skills  2.2 Research skills  2.3 Analytical skills  2.4 Ability to research industry information sources  2.5 Networking skills  2.6 Developing work plans |

| ELEMENT                           | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS  |
|-----------------------------------|--|---|---|
| 3. Maintain                       | 3.1 <b>Problems</b> with   | systems and procedures 2.7 Principles of time management 2.8 Conflict management techniques 2.9 Enterprise training requirements and processes 3.1 Different  | 3.1 Questioning and   |
| effective<br>working<br>relations | team members are recognized and addressed 3.2 Assistance of team members when difficulties arise to achieve allocated tasks are sought 3.3 Requirements of work activities using a participative approach are communicated 3.4 Disagreements and conflicts constructively using appropriate conflict management strategies are managed | leadership styles and the characteristics of effective leadership 3.2 Principles of teamwork, including characteristics of effective teams, organization of teams, potential team problems and the benefits of effective teamwork 3.3 Role and theories of motivation and its application to different workplace contexts 3.4 Organizational structure and group dynamics 3.5 Legislative issues that impact on team management, including equal employment opportunity, diversity, anti- discrimination and unfair | communication skills 3.2 Research skills 3.3 Analytical skills 3.4 Networking skills 3.5 Managing conflicts |

| ELEMENT             | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|---------------------|---|--|--|
| 4. Provide feedback | 4.1 Clear and constructive feedback to  | dismissal 3.6 Performance appraisal systems and procedures 3.7 Principles of time management 3.8 Conflict management techniques 3.9 Enterprise training requirements and processes 4.1 Team mechanism 4.2 Different leadership styles  | 4.1 Questioning and communication skills                         |
|                     | individuals to support achievement of outcomes are provided 4.2 Team and individual performances to ensure team members are able to achieve goals are monitored 4.3 Opportunity for individual development is identified 4.4 Clear supervisory and reporting responsibilities in line with organizational requirements are maintained | and the characteristics of effective leadership 4.3 Principles of teamwork, including characteristics of effective teams, organization of teams, potential team problems and the benefits of effective teamwork 4.4 Role and theories of motivation and its application to different workplace contexts 4.5 Organizational structure and group dynamics 4.6 Legislative issues that impact on team management, including equal employment opportunity, | 4.2 Research skills 4.3 Analytical skills 4.4 Providing feedback |

| ELEMENT | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS |
|---------|--|--|--------------------|
|         |  | diversity, antidiscrimination and unfair dismissal 4.7 Performance appraisal systems and procedures 4.8 Principles of time management 4.9 Conflict management techniques 4.10 Enterprise training requirements and processes with organizational requirements are maintained |                    |

| VARIABLE                 | RANGE   |
|--------------------------|---|
| Operational plans and    | May include:  |
| objectives               | 1.1 Sales targets   |
|                          | 1.2 Performance targets for a particular project  |
|                          | 1.3 Increased productivity  |
|                          | 1.4 Meeting key performance indicators (KPI)  |
|                          | 1.5 Short, medium or long-term goals  |
| 2. Team                  | May include:  |
|                          | 2.1 Project-based   |
|                          | 2.2 Permanent teams   |
|                          | 2.3 Paid workers  |
|                          | 2.4 Volunteers  |
|                          | 2.5 Work role team  |
|                          | 2.6 Peers   |
| O Mark Diago             | 2.7 Subordinates  |
| 3. Work Plans            | May include:  |
|                          | 3.1 Verbal work plans   |
|                          | 3.2 Written work plans  |
|                          | 3.3 Daily priorities  |
|                          | 3.4 Weekly priorities   |
|                          | 3.5 Regular duties and/or work tasks  |
| 4. Targets and task      | May include:  |
| objectives               | 4.1 Sales targets   |
|                          | 4.2 Promotional activities  |
| 5. Training and learning | May include:  |
| opportunities            | 5.1 Coaching  |
|                          | <ul><li>5.2 Mentoring</li><li>5.3 Structured on-the-job training</li></ul>              |
|                          | <ul><li>5.3 Structured on-the-job training</li><li>5.4 Opportunistic learning</li></ul> |
|                          | 5.5 Modelling   |
|                          | May include:  |
| 6. Problems              | 6.1 Conflicts in priorities   |
|                          | 6.2 Resource constraints  |
|                          | 6.3 Lack of information   |
|                          | 6.4 Supplier delays   |
|                          | 6.5 Differences in opinion 6.6 Interpersonal conflict                                   |
|                          | 6.6 Interpersonal conflict 6.7 Hazardous events   |
|                          | 6.8 Time constraints  |
|                          | 6.9 Shortfalls in expected outcomes   |

| VARIABLE                       | RANGE   |  |
|--------------------------------|---|--|
| 7. Participative approach      | May include: 7.1 Clarity of purpose, including vision, mission, goals |  |
|                                | 7.2 Communication   |  |
|                                | 7.3 Collaboration   |  |
|                                | 7.4 Building trust  |  |
|                                | 7.5 Team involvement  |  |
|                                | May include:  |  |
| 8. Conflict management         | 8.1 Assertiveness   |  |
| strategies                     | 8.2 Listening   |  |
|                                | 8.3 Non-verbal communication  |  |
|                                | 8.4 Language style  |  |
|                                | 8.5 Problem solving   |  |
|                                | 8.6 Negotiation   |  |
|                                | 8.7 Mediation   |  |
|                                | May include:  |  |
| 9. Feedback                    | 9.1 Performance   |  |
|                                | 9.2 Service standards   |  |
|                                | 9.3 Skills and knowledge  |  |
|                                | 9.4 Progress  |  |
| 10. Opportunity for individual | May include:  |  |
| development                    | 10.1 Internal training/professional development                       |  |
| ·                              | 10.2 External training/professional development                       |  |
|                                | 10.3 Change in job responsibilities                                   |  |
|                                | 10.4 Opportunity for greater autonomy or responsibility               |  |
|                                | 10.5 Formal promotion   |  |
|                                | 10.6 Allocating responsibility for plans or objectives                |  |

| 1. Critical aspects of   | Assessment requires evidence that the candidate:  |
|--------------------------|---|
| Competency               | 1.1 Demonstrated ability to supervise and instruct staff to achieve work activities   |
|                          | 1.2 Demonstrated ability to delegate and allocate tasks   |
|                          | 1.3 Demonstrated ability to assess and evaluate staff competency  |
|                          | <ol> <li>Demonstrated ability to identify and provide training requirements</li> </ol>  |
|                          | <ol> <li>Demonstrated ability to plan and monitor ongoing training needs</li> </ol>   |
|                          | 1.6 Demonstrated ability to plan timesheets and timetables to meet deadlines  |
|                          | <ol> <li>Demonstrated ability to achieve effective time<br/>management</li> </ol>   |
|                          | <ol> <li>Demonstrated ability to maintain safe workplace and<br/>environmentally responsible practices</li> </ol>   |
|                          | <ol> <li>Demonstrated ability to solve problems, such as staffing, resources</li> </ol>   |
|                          | 1.10 Demonstrated ability to communicate information and instructions, provided feedback and prepared reports and performance appraisals.   |
| 2. Resource Implications | <ul> <li>The following resources should be provided:</li> <li>2.1 Training and assessment to include access to a real or simulated workplace and relevant documentation, such as strategic plans, information on the internal and external operating environment and customer satisfaction data; and access to workplace standards, procedures, policies, guidelines, tools and equipment.</li> </ul> |
| 3. Method of Assessment  | Competency in this unit may be assessed through:  |
|                          | <ul> <li>3.1 Case studies</li> <li>3.2 Observation of practical candidate performance</li> <li>3.3 Oral and written questions</li> <li>3.4 Portfolio evidence</li> <li>3.5 Problem solving</li> <li>3.6 Role plays</li> </ul>   |
|                          | <ul><li>3.7 Third party reports completed by a supervisor</li><li>3.8 Project and assignment work</li></ul>   |
| 4. Context of Assessment | 4.1 Competency may be assessed in the actual workplace or at the designated TESDA Accredited Assessment Center.   |

MANAGE QUALITY CUSTOMER SERVICE **UNIT OF COMPETENCY** 

UNIT CODE TRS141211

**UNIT DESCRIPTOR** This unit covers the knowledge, skills and attitudes required to

manage customer service quality in the workplace within a tourism or hospitality context. It focuses on the need to develop active approaches

| to service quality issues with some strategic f | ocus. |
|---|-------|
|---|-------|

| ELEMENT   | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|---|---|--|--|
| 1. Develop approaches to enhance customer service quality | <ul> <li>1.1 Information on customer needs, expectations and satisfaction levels is obtained using both <i>informal and formal research</i>.</li> <li>1.2 Opportunities are provided for both customers and colleagues to provide feedback on products and services.</li> <li>1.3 <i>Changes in internal and external environments</i> are reviewed and findings are integrated into planning for quality service.</li> <li>1.4 Opportunities are provided for colleagues to participate in the customer service planning process.</li> <li>1.5 Standards and plans are developed to address key quality service issues in accordance with company</li> </ul> | 1.1 Communication techniques 1.2 Informal and formal research 1.3 Customer service relations 1.4 Actions that can be implemented by staff working in the hotel and travel industries 1.5 Quality customer service 1.6 Feedback mechanism | <ul> <li>1.7 Questioning and communication skills</li> <li>1.8 Research skills</li> <li>1.9 Analytical skills</li> <li>1.10 Ability to research industry information sources</li> <li>1.11 Identifying relevant information</li> <li>1.12 Compilation and classification of information and data</li> <li>1.13 Networki ng skills</li> </ul> |

|   | standards.  |   |  |
|---|---|---|--|
| 2. Manage the delivery of quality service | 2.1 Customer service standards and expectations are clearly communicated to colleagues 2.2 Access to information on service standards and delivery is provided to colleagues. 2.3 Coaching is used to assist colleagues to deal with customer service issues and to take responsibility for service outcomes. 2.4 Customer service in the workplace is monitored to ensure standards are met in accordance with enterprise policies and procedures. | 2.1 Communication techniques 2.2 Customer service standards 2.3 Actions that can be implemented by staff working in the hotel and travel industries   | 2.1 Questioning and communication skills 2.2 Research skills 2.3 Analytical skills 2.4 Ability to research industry information sources 2.5 Identifying relevant information 2.6 Compilation and classification of information and data 2.7 Networking skills 1.14 Monitoring customer service |
| 3. Monitor and adjust customer service    | 3.1 Feedback is sought from customers on an ongoing basis and this is used to improve performance where applicable. 3.2 Customer service problems are identified and adjustments to standards, systems and procedures are made to ensure continued service quality. 3.3 New approaches are communicated to all those involved in service delivery within 2.5 appropriate timeframes.  | <ul> <li>3.1 Communication techniques</li> <li>3.2 Customer service standards</li> <li>3.3 Actions that can be implemented by staff working in the hotel and travel industries</li> <li>3.4 Quality customer service</li> <li>3.5 Feedback mechanism</li> <li>3.6 Quality service principles and processes</li> </ul> | 3.1 Questioning and communication skills 3.2 Research skills 3.3 Analytical skills 3.4 Identifying relevant information 3.5 Networking skills 2.8 3.6 Identifying customer service problems  |

| VARIABLE                                      | RANGE  |
|---|--|
| 1. Informal and formal research               | May include: 1.1 Talking to customers 1.2 Qualitative or quantitative research 1.3 Seeking feedback from service delivery colleagues 1.4 Analysis of competitive environment 1.5 Analysis of industry and market trends  |
| Changes in internal and external environments | May include:  2.1 Management changes  2.2 Organizational restructuring  2.3 Introduction of new equipment  2.4 Recruitment practices  2.5 Technological changes affecting service delivery  2.6 Changes in the competitive environment  2.7 Economic climate  2.8 Trends in customer preferences  2.9 Advent of E-business |
| 3. Customer Service<br>Standards              | May include: 3.1 Response times 3.2 Service guarantees 3.3 Pricing guarantees 3.4 Product quality 3.5 Document presentation standards 3.6 Personal presentation standards 3.7 Complaint management   |
| 4. Customer service issues                    | May include: 4.1 Response times 4.2 Service guarantees 4.3 Pricing guarantees 4.4 Product quality 4.5 Document presentation standards 4.6 Personal presentation standards 4.7 Complaint management   |

| Critical aspects of Competency | Assessment requires evidence that the candidate:  1.1 Demonstrated ability to develop proactive approaches to the delivery and monitoring of quality customer service within a specific tourism/hospitality context  1.2 Demonstrated knowledge of quality service principles and processes.  |
|--------------------------------|---|
| 2. Resource Implications       | <ul> <li>The following resources should be provided:</li> <li>2.1 Project or work activities conducted over a period of time to allow the candidate to establish, monitor and evaluate service delivery in a tourism or hospitality context</li> <li>2.2 Involvement of a team for which the candidate is leader</li> </ul>   |
| 3. Methods of Assessment       | Competency in this unit may be assessed through:  3.1 Evaluation of projects managed by the candidate in conjunction with industry to enhance service delivery in a given operation  3.2 Evaluation of projects managed by the candidate to create, market and deliver a tourism or hospitality service  3.3 Case studies to assess specific service delivery issues in different workplace contexts  3.4 Oral or written questions to assess knowledge of quality assurance concepts and principles  3.5 Review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate |
| 4. Context for Assessment      | 4.1 Competency may be assessed in the actual workplace or at the designated TESDA Accredited Assessment Center.   |

UNIT OF COMPETENCY: MANAGE FINANCES WITHIN A BUDGET

UNIT CODE : TRS141212

**UNIT DESCRIPTOR**: This unit covers the knowledge, skills and attitudes required to

take responsibility for budget management where others may

have developed the budget.

| ELEMENT  | PERFORMANCE CRITERIA Bold and italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS   |
|--|---|---|--|
| Allocate budget resources                      | <ul> <li>1.1 Funds are allocated according to agreed priorities.</li> <li>1.2 Changes in income and expenditure priorities are discussed with colleagues prior to implementation</li> <li>1.3 All relevant personnel are consulted and informed in relation to resource decisions</li> <li>1.4 Awareness of the importance of budget control is promoted</li> <li>1.5 Detailed records of resource allocation are maintained in accordance with enterprise control systems</li> </ul> | 1.1 Basic budget principles 1.2 Budget formulation 1.3 Financial information system 1.4 Managing finances within a budget 1.5 Importance of budget control 1.6 Enterprise control systems 1.7 Standards for organizational recordkeeping and audit requirements 1.8 Record Keepings     | <ul><li>1.1 Analytical skills</li><li>1.2 Networking skills</li><li>1.3 Allocating funds</li><li>1.4 Maintaining records</li></ul>   |
| 2. Monitor financial activities against budget | 2.1 Actual income and expenditures are checked against <i>budget</i> and at regular intervals  2.2 Financial commitments are included in all documentation to ensure accurate   | <ul> <li>2.1 Basic budget principles</li> <li>2.2 Budget formulation</li> <li>2.3 Financial information system</li> <li>2.4 Income and expenditures</li> <li>2.5 Managing finances within a budget</li> <li>2.6 Importance of budget control</li> <li>2.7 Enterprise control</li> </ul> | <ul> <li>2.1 Analytical skills</li> <li>2.2 Networking skills</li> <li>2.3 Monitoring     expenditures</li> <li>2.4 Calculating     profit/loss and     cash flow</li> </ul> |

| ELEMENT  | PERFORMANCE CRITERIA Bold and italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|--|--|--|---|
|  | monitoring  2.3 Deviations are identified and reported according to company policy and significance of deviation  2.4 Options for more effective management of deviations are investigated  2.5 Colleagues are advised of budget status in relation to targets within agreed timeframes.   | systems  2.8 Standards for organizational recordkeeping and audit requirements  2.9 Company policies and procedures  2.10 Significance of deviation  2.11 Budget monitoring  |   |
| 3. Identify and evaluate options for improved budget performance | 3.1 Existing costs and resources are assessed and areas for improvement are identified 3.2 Desired outcomes are discussed with relevant colleagues 3.3 Research is conducted to investigate new approaches 3.4 Benefits and disadvantages of new approaches are defined and clearly communicated 3.5 Impacts on customer service levels and colleagues are considered when developing new approaches | <ul> <li>3.1 Basic budget principles</li> <li>3.2 Research</li> <li>3.3 Budget formulation</li> <li>3.4 Financial information system</li> <li>3.5 Income and expenditures</li> <li>3.6 Managing finances within a budget</li> <li>3.7 Importance of budget control</li> <li>3.8 Enterprise control systems</li> <li>3.9 Standards for organizational recordkeeping and audit requirements</li> </ul> | <ul> <li>3.1 Research skills</li> <li>3.2 Analytical skills</li> <li>3.3 Networking skills</li> <li>3.4 Monitoring     expenditures</li> <li>3.5 Calculating     profit/loss and cash     flow</li> <li>3.6 Restructuring/improv     ng budget</li> </ul> |

| ELEMENT                       | PERFORMANCE CRITERIA Bold and italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|-------------------------------|--|--|---|
|                               | are presented clearly and logically to the appropriate person/ department.   |  |   |
| 4. Complete financial reports | 4.1 All required financial reports are completed within designated timelines 4.2 Clear and concise information are produced to enable informed decision- making 4.3 Reports are promptly forwarded to the appropriate person/department. | <ul> <li>4.1 Basic budget principles</li> <li>4.2 Basic Research</li> <li>4.3 Budget formulation</li> <li>4.4 Financial information system</li> <li>4.5 Income and expenditures</li> <li>4.6 Budget report preparation</li> <li>4.7 Standards for organizational recordkeeping and audit requirements</li> </ul> | <ul> <li>4.1 Research skills</li> <li>4.2 Analytical skills</li> <li>4.3 Networking skills</li> <li>4.4 Monitoring expenditures</li> <li>4.5 Preparing budget report</li> </ul> |

| VARIABLE             | RANGE   |
|----------------------|---|
| 1. Budget            | May include:  |
|                      | 2.1 Cash budgets                                    |
|                      | 2.2 Departmental budget                             |
|                      | 2.3 Wages budget                                    |
|                      | 2.4 Project budget                                  |
|                      | 2.5 Purchasing budget                               |
|                      | 2.6 Sales budget                                    |
|                      | 2.7 Cashflow budget                                 |
|                      | 2.8 Budget for a small business                     |
| 2. Research          | May include:  |
|                      | 2.1 Discussions with existing suppliers             |
|                      | 2.2 Sourcing of new suppliers                       |
|                      | 2.3 Evaluation of staffing/rostering requirements   |
|                      | 2.4 Review of operating procedures                  |
|                      | 2.5 Potential rostering changes                     |
| 3. Financial reports | May include:  |
|                      | 3.1 Daily, weekly, monthly transactions and reports |
|                      | 3.2 Break-up by department                          |
|                      | 3.3 Occupancy                                       |
|                      | 3.4 Sales performance                               |
|                      | 3.5 Commission earnings                             |
|                      | 3.6 Sales returns                                   |
|                      | 3.7 Yield management                                |
|                      | 3.8 Commercial account activity                     |

|                                | T   |
|--------------------------------|---|
| Critical aspects of Competency | Assessment requires evidence that the candidate:  1.1 Demonstrated knowledge of basic budget principles and structures  1.2 Knows budgeting terminology relevant to a specific industry context  1.3 Demonstrated the ability to monitor income and expenditure in accordance with the budget, and to identify ways of improving budget performance  1.4 Demonstrated understanding of the main types of budget that apply in the specific enterprise or industry context   |
| 2. Resource<br>Implications    | The following resources should be provided:  2.1 Project or work activities that include the management of and reporting on a budget for a specific project or operational area over a period of time so that the monitoring and implementation aspects of the unit can be assessed  2.2 Use of figures and data that reflect the financial operating conditions of industry  2.3 The requirement to evaluate options for improved budget performance   |
| 3. Methods of<br>Assessment    | Competency in this unit may be assessed through:  3.1 Evaluation of financial reports detailing financial performance of projects or activities conducted by the candidate  3.2 Evaluation of reports produced by the candidate detailing the processes undertaken to manage finances within a budget  3.3 Case studies and problem solving to assess application of the principles of budget management to different situations  3.4 Review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate |
| 4. Context for<br>Assessment   | 4.1 Competency may be assessed in actual workplace or at the designated TESDA Accredited Assessment Center.   |

UNIT OF COMPETENCY: PLAN AND IMPLEMENT A SERIES OF TRAINING EVENTS

UNIT CODE : TRS141213

UNIT DESCRIPTOR : This unit covers the knowledge, skills and behavior required to

plan training events in response to identified workplace need and administer the implementation to optimize training effectiveness. This unit reflects a management function and not a trainer function and is likely to be applicable to an organization

that has multiple workplaces/sites.

| ELEMENT                             | PERFORMANCE CRITERIA  Bold and italicized terms  are elaborated in the Range  of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|-------------------------------------|--|--|--|
| 1. Plan a series of training events | 1.1 Training needs are identified and verified 1.2 Training needs are identified and prioritized. 1.3 Resources available to support training events to address identified training need are determined 1.4 Training events that will address identified workplace training need are identified workplace training need are identified. 1.5 Availability of learners to attend and participate in identified training events are determined. 1.6 Stakeholders in planning activities are involved. 1.7 A schedule for implementing identified training events is developed. 1.8 An operational plan to support the implementation of identified training events is developed. 1.9 The implementation plan for training events with | 1.1 Communication techniques 1.2 Enterprise policies and procedures 1.3 Training needs 1.4 Events planning | 1.1 Questioning and communicatio n skills 1.2 Research skills 1.3 Analytical skills 1.4 Ability to research industry information sources 1.5 Networking skills 1.6 Planning a training event |
|                                     | stakeholders is shared 1.10 Identified learners to engage with established training events are encouraged  |  |  |

| ELEMENT                                    | PERFORMANCE CRITERIA  Bold and italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|--|---|--|---|
| Implement a series of training events      | <ul> <li>2.1 Identified support for learners to attend identified training events is provided</li> <li>2.2 Resources for supervisors to maintain</li> </ul> | techniques 2.2 Enterprise policies and procedures                              | 2.1 Questioning and communicatio n skills 2.2 Research skills   |
|  | required service levels during identified training  |  | 2.3 Analytical skills   |
|  | events are provided 2.3 Learners of attendance requirements as required by the  |  | 2.4 Ability to research industry information sources  |
|  | organization are advised  |  | 2.5 Networking skills   |
|  | 2.4 Feedback from learners<br>on individual training events<br>is captured  |  | 2.6 Implementing a training event   |
|  | 2.5 Planned schedule of training events on the basis of feedback and other issues arising is modified   |  |   |
|  | 2.6 <b>Training events</b> to monitor and evaluate their implementation are attended  |  |   |
|  | 2.7 Contact with training event organizers/providers is maintained  |  |   |
| Review     planning and     implementation | 3.1 The <i>impact of attendance</i> at training event is evaluated  | <ul><li>3.1 Communication techniques</li><li>3.2 Enterprise policies</li></ul> | 3.1 Questioning and communication skills  |
| of a series of training events             | 3.2 The value-for-money provided by engagement with training events is assessed   | and procedures 3.3 Events planning 3.4 Preparation of report                   | <ul><li>3.2 Research skills</li><li>3.3 Analytical skills</li><li>3.4 Ability to</li><li>research</li></ul> |
|  | 3.3 Ways in which more cost-<br>effective use of training<br>events could be effected   | Ισροιτ   | industry<br>information<br>sources  |
|  | are identified 3.4 A report on the use of training events within the organization is prepared   |  | 3.5 Networking skills 3.6 Preparing report  |

| VARIABLE                   | RANGE   |  |
|----------------------------|---|--|
| 1. Training needs          | May include:  |  |
|                            | <ul> <li>1.1 Reviewing the results of training needs analyses</li> <li>1.2 Reviewing individual input, including requests for training, from staff, co-workers, customers, supervisors, managers and other relevant personnel</li> <li>1.3 Reviewing business plans, directions and objectives</li> <li>1.4 Reviewing existing qualifications, certificates, licenses held by staff</li> <li>1.5 Reviewing changed workplace conditions necessitating staff training, including changes to equipment, procedures, legislation, layout, customer preferences</li> <li>1.6 Clarifying training requirements by site, department, individual worker, workplace teams</li> </ul>  |  |
| 2. Training needs are      | May include:  |  |
| identified and prioritized | Matching training need against workplace demands, by site, department, individual worker, workplace teams   |  |
|                            | <ul> <li>2.2 Factoring in legislated obligations</li> <li>2.3 Determining existing competency levels to cater for anticipated demand</li> <li>2.4 Determining costs associated with immediate and short- term training events to respond to urgent training needs</li> <li>2.5 Identifying the impact of not responding immediately to urgent need</li> <li>2.6 Identifying other priority activities that the organisation is required to accommodate</li> <li>2.7 Integrating complementary imperatives and priorities</li> <li>2.8 Identifying alternative short-term action, other than training events, that can be taken to address immediate priority needs</li> </ul> |  |
| 3. Resources               | May include: 3.1 Time 3.2 Space/location and venues 3.3 Human resources 3.4 Financial resources 3.5 Physical resources 3.6 Network of contact 3.7 Externally available training events  |  |

| VARIABLE                       | RANGE   |  |
|--------------------------------|---|--|
| 4. Training events             | May include:  |  |
| Ğ                              | 4.1 Traditional training sessions   |  |
|                                | 4.2 Computer-based learning   |  |
|                                | 4.3 Home study  |  |
|                                | 4.4 Correspondence training and education   |  |
|                                | 4.5 Conferences, seminars, meetings,  |  |
|                                | exhibitions, trade presentations, workshops,                                      |  |
|                                | symposiums 4.6 Training provided by suppliers, support                            |  |
|                                | industries, industry peak bodies and/or   |  |
|                                | government agencies   |  |
|                                | 4.7 Generic training courses, including a series of                               |  |
|                                | training events, offered by external training providers                           |  |
|                                | 4.8 Field trips, experiential learning, visits to nominated                       |  |
|                                | businesses, sites or venues   |  |
|                                | 4.9 Guest speakers  |  |
|                                | 4.10 Demonstrations and talks by acknowledged subject                             |  |
|                                | specialists   |  |
|                                | 4.11 Formal and informal learning opportunities relevant                          |  |
|                                | to identified need  |  |
| 5. Availability of learners to | May include:  |  |
| attend and participate         | 4.1 Interrogating existing staff rosters to identify                              |  |
|                                | flexibility available to accommodate staff  |  |
|                                | absences and attendance at training events  |  |
|                                | 4.2 Liaising with supervisors to identify alternative                             |  |
|                                | staff to back-fill those attending training events                                |  |
|                                | 4.3 Liaising with the financial department to calculate                           |  |
|                                | staffing costs associated with attendance at                                      |  |
|                                | training events   |  |
| 6 Decemmendations              | 4.4 Identifying peak and low trading times, days, periods                         |  |
| 6. Recommendations             | May include:  |  |
|                                | 6.1 Discussing individual and group preferences for training events               |  |
|                                | 6.2 Identifying individual and group barriers to                                  |  |
|                                | attendance at training events   |  |
|                                | 6.3 Identifying learner preferences for training events                           |  |
|                                | 6.4 Discussing training event options with  |  |
|                                | supervisors, managers and learners  |  |
|                                | 6.5 Explaining the need for the training events                                   |  |
|                                | 6.6 Identifying the benefits that will flow from participation in training events |  |
|                                | 6.7 Describing the support available for those who                                |  |
|                                | engage with learning events, including travel                                     |  |
|                                | allowances, payment of fees and charges, per diem                                 |  |
|                                | allowances, payment for meals and accommodation,                                  |  |

| VARIABLE  | RANGE  |
|---|--|
|   | where applicable 6.8 Discussing time off to engage with training events, including necessary study, practice, and assessment as appropriate to individual training events  |
| 7. Schedule for implementing identified training events | <ul> <li>May include:</li> <li>7.1 Accommodating individual workplace operational needs to the greatest extent possible</li> <li>7.2 Accommodating individual learner preferences to the greatest extent possible</li> <li>7.3 Limiting training events and numbers attending to meet imposed budgetary and other operational constraints</li> <li>7.4 Identifying specific days, dates, times and staff for individual training events at each location/venue</li> <li>7.5 Coordinating the attendance of learners from multiple sites/departments at the one training event</li> <li>7.6 Identifying relevant training events that will optimise learning while minimising expenditure, including the need to identify local venues and training events wherever possible</li> <li>7.7 Communicating a draft schedule to learners and management/supervisors</li> <li>7.8 Revising attendance at training events, on the basis of feedback received regarding the draft schedule, to the greatest extent possible commensurate with achieving the necessary training objectives</li> </ul> |
| 8. Operational plan                                     | May include:  8.1 Allocating responsibilities for actions within the plan, including delegation of authority and/or the establishment of revised scopes of authority  8.2 Enrolling and/or registering learners in training events  8.3 Supplying learners with confirmation of enrolment and/or registration, including details of the training event and any necessary preparations and/or pre-requisites that apply  8.4 Developing a framework within which attendees at training events can pass on knowledge and skills learned to other staff in the workplace/organisation  8.5 Authorising staff back-filling arrangements and extensions to labour budgets as appropriate  8.6 Determining criteria to be used when evaluating post- participation in training events  |

| VARIABLE   | RANGE   |  |
|--|---|--|
| 9. Implementation Plan   | May include:  |  |
|  | <ul> <li>9.1 Providing hard-copy information, such as letters to staff, notes in pay envelopes, posters in the workplace</li> <li>9.2 Mentioning the training events at staff meetings and briefings</li> <li>9.3 Using electronic communication facilities, including email, intranet and facsimiles</li> <li>9.4 Conducting training event-specific information sessions</li> </ul>   |  |
| 10. Support for learners to  | May include:  |  |
| attend identified training events  | 10.1 Payment, or other arrangements, such as vehicles/per diems, for travel and accommodation 10.2 Supply of pre-training event materials, such as  |  |
|  | pre-event reading matter  10.3 Identification and/or confirmation of training event venue and attendance times, locations  10.4 Clarification with learners regarding organisational expectations regarding the training event  10.5 Provision of time to allow learners to prepare for, and travel to, the training event  |  |
|  | 10.6 Changes to rosters.  |  |
| 11. Required resources for supervisors to maintain required service levels | <ul> <li>May include:</li> <li>11.1 Authorising and/or arranging for supplementary staff to replace learners who are attending training events</li> <li>11.2 Modifying normal workloads to factor in the absence of traditional staffing levels</li> <li>11.3 Revising workplace activities to accommodate reduced staff levels</li> <li>11.4 Amending trading hours</li> <li>11.5 Closing sites, where appropriate</li> <li>11.6 Authorising the payment of overtime to normal staff to enable them to back-fill learners</li> </ul> |  |
| 12. Attendance requirements  | May include:  |  |
|  | <ul> <li>12.1 Punctuality</li> <li>12.2 Attendance for the duration of nominated aspects of the training event</li> <li>12.3 Active participation in activities</li> <li>12.4 Engagement with all aspects of the training event</li> <li>12.5 Undertaking assessment that comprises part of the training event</li> <li>12.6 Networking with other training event</li> </ul>  |  |

| VARIABLE                                | RANGE  |  |
|---|--|--|
|   | participant/s  12.7 Returning to work with copies of materials or resources provided at the training event  12.8 Focus on nominated training needs as applicable to individual learners, work sites, departments and/or the organisation as an overall entity  12.9 Being able to demonstrate/prove attendance at the training event  12.10 Completing an evaluation of the training event  12.11 Sharing knowledge, skills and attitudes learned at the training event with other staff |  |
| 13. Feedback from learners              | May include:  13.1 Written or verbal feedback 13.2 Compulsory feedback on all participation in training events 13.3 Comments on relevance of the training event content 13.4 Explanation of the extent to which learners believed the training event assisted in addressing identified training needs 13.5 Ensuring feedback represents a valid profile of learners who attended the training event 13.6 Discussing concerns with training event organizers                              |  |
| 14. Planned schedule of training events | 9  |  |

| VARIABLE            | RANGE   |  |  |
|---------------------|---|--|--|
|                     | starting and finishing times, duration of training events, activities, assessment activities, catering arrangements, plenary sessions  14.9 Discussing impact of proposed changes on operational issues with supervisors, staff, management, customers  14.10 Communicating revisions to schedules to learners and relevant others  |  |  |
| 15. Training events | May include:  |  |  |
| 13. Hairing events  | <ul> <li>15.1 Gathering first-hand opinion regarding applicability of the training event to identified needs, including evaluation of relevance, currency of ideas/information, presentation style and techniques used, value for money provided by the training event, evidence of appropriate planning by organisers/providers for the training event</li> <li>15.2 Monitoring the extent to which learners interacted with the training event</li> <li>15.3 Talking to learners to gain their immediate thoughts on the training event</li> <li>15.4 Monitoring the activities, presenters, trainers, resources used in the training event</li> <li>15.5 Actively networking with participants at the training event</li> <li>15.6 Capturing materials and resources provided at the training event for later use within the organisation</li> <li>15.7 Monitoring content delivered, and/or actions observed, at the training event with a view to using it and/or adapting it for organisational application at a later date</li> <li>15.8 Providing tangible support for learners who have attended the training event</li> <li>15.9 Reaching conclusions about future use of individual training events in addressing identified training needs</li> <li>15.10 Providing input to the training event will meet the identified objectives for each event</li> </ul> |  |  |
|                     | ,   |  |  |

| VARIABLE  | RANGE   |  |  |
|---|---|--|--|
| 16. Impact of attendance at training events                         | May include:  16.1 Seeking input from all relevant stakeholders  16.2 Comparing pre-training event workplace practice, operation, statistics with post-training event workplace practice, operation, statistics  16.3 Focusing on the criteria that were identified as being central to evaluating participation in training events in the planning phase  16.4 Comparing the outcomes of attending training events with participation in more standard/traditional training delivery |  |  |
| 17. The value-for-money provided by engagement with training events | May include:  18.1 Opportunities to practice during the training sessions  18.2 Opportunities to practice in a dedicated training/practice area out of work  18.3 Provision of supervised on-the-job opportunities, including supervision by trainers, supervisors, and other senior/experienced staff  18.4 Integration of on-the-job and off-the-job practice opportunities   |  |  |
| 19. Feedback to learners  | May include: 19.1 Ensuing feedback is provided sensitively 19.2 Using positive feedback to motivate and encourage learners 19.3 Recognizing effort and not just success 19.4 Providing negative feedback using the positive- negative-positive sandwich methods 19.5 Being sincere in the giving of feedback 19.6 Being open as a trainer to feedback from learners 19.7 Using verbal and non-verbal techniques to provide feedback   |  |  |

| 1. Critical aspects of Competency | Assessment requires evidence that the candidate:  1.1 Demonstrated understanding of host enterprise policies and procedures in regard to the provision of workplace training delivery and assessment  1.2 Demonstrated ability to investigate and effectively determine the training requirements for a nominated group of workers in a defined workplace context  1.3 Demonstrated ability to prepare an effective and practical training/delivery plan to address a nominated training topic/area in a given workplace context for a defined group of at least six learners; the training/delivery plan  1.4 Demonstrated ability to deliver a nominated training session to identified learners in a given workplace training context |  |  |
|-----------------------------------|--|--|--|
| 2. Resource                       | The following resources should be provided:  |  |  |
|                                   |  |  |  |
| Implications                      | 2.1 Real or simulated workplace  |  |  |
|                                   | 2.2 Access to workplace standards, procedures,   |  |  |
|                                   | policies, guidelines   |  |  |
|                                   | 2.3 Tools and equipment.   |  |  |
| 3. Methods of                     | Competency in this unit may be assessed through:   |  |  |
| Assessment                        | 3.1 Observation of practical candidate performance Oral  |  |  |
|                                   | and written questions  |  |  |
|                                   | 3.2 Portfolio evidence, including data on learner  |  |  |
|                                   | competencies, training needs, training standards and   |  |  |
|                                   | documents relating to session/delivery plan, and training  |  |  |
|                                   | resources/materials developed  |  |  |
|                                   | 3.3 Problem solving  |  |  |
|                                   | 3.4 Role plays   |  |  |
|                                   | 3.5 Third party reports completed by a supervisor  |  |  |
|                                   | 3.6 Project and assignment work  |  |  |
| 4. Context for                    |  |  |  |
|                                   | 4.1 Competency may be assessed in actual workplace or at the   |  |  |
| Assessment                        | designated TESDA Accredited Assessment Center  |  |  |
|                                   |  |  |  |

UNIT OF : USE THE ASSESSMENT SYSTEM FOR TRAINING

COMPETENCY OUTCOMES

UNIT CODE : TRS141214

UNIT DESCRIPTOR : This unit covers the knowledge, skills and behavior required

to manage an assessment system for employees within a

work context.

| ELEMENT                                     | PERFORMANCE CRITERIA Bold and italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|---|---|--|--|
| 1. Communicate the assessment system        | 1.1 The purpose of the assessment system is defined 1.2 Assessment system features and procedures to relevant stakeholders is documented and circulated 1.3 Procedures for keeping relevant stakeholders informed about key features of the assessment system are established | 1.1 Communication techniques 1.2 Assessment system features and procedures 1.3 Enterprise policies and procedures 1.4 Impact of assessment system for training outcomes                            | 1.1 Questioning and communication skills 1.2 Research skills 1.3 Analytical skills 1.4 Ability to research industry information sources 1.5 Networking skills 1.6 Defining the purpose of assessment system  |
| 2. Provide support for enterprise assessors | 2.1 Assessors meet required competency standards is verified 2.2 Required training for assessors is identified 2.3 Moderation of assessments is provided. 2.4 Feedback to assessors on their performance is provided 2.5 Networking amongst assessors is facilitated          | 2.1 Communication techniques 2.2 Assessment system features and procedures 2.3 Enterprise policies and procedures 2.4 Moderation of assessment 2.5Requirements for assessors 2.6Feedback mechanism | 2.1 Questioning and communication skills 2.2 Research skills 2.3 Analytical skills 2.4 Ability to research industry information sources 2.5 Networking skills 2.6 Providing support for enterprise assessors |

| ELEMENT  | PERFORMANCE CRITERIA Bold and italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS  |
|--|---|---|---|
| 3. Manage the assessment record keeping system | 3.1 The internal records required to support the assessment system is identified and developed 3.2 The requirements for completing the assessment records are described 3.3 The assessment records are filed. 3.4 The assessment record keeping system is reviewed and updated.   | 3.1Communication techniques 3.2 Assessment system features and procedures 3.3 Enterprise policies and procedures 3.4 Standards for organizational recordkeeping and audit requirements 3.5 Requirements for completing the assessment records | 3.1 Questioning and communication skills 3.2 Research Skills 3.3 Analytical Skills 3.4 Ability to research industry information sources 3.5 Networking Skills 3.6 Updating the assessment record keeping system                       |
| 4. Maintain quality assurance procedures       | <ul> <li>4.1 Quality assurance procedures for the assessment system are defined</li> <li>4.2 Internal audits of the assessment system are undertaken</li> <li>4.3 The results of quality assurance audits to improve the assessment system are used</li> <li>4.4 The applicability of the existing quality assurance procedures to the dynamic nature of the assessment system is reviewed</li> </ul> | 4.1 Communication techniques 4.2 Assessment system features and procedures 4.3 Enterprise policies and procedures 4.4 Standards for organizational recordkeeping and audit requirements 4.5 Quality assurance procedures                      | 4.1 Questioning and communication skills 4.2 Research skills 4.3 Analytical skills 4.4 Ability to research industry information sources 4.5 Networking skills 4.6 Defining the quality assurance procedures for the assessment system |

| ELEMENT  | PERFORMANCE CRITERIA Bold and italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|--|--|--|---|
| 5. Report on the contribution made by the assessment system to enterprise training and performance | 5.1 The outcomes that the assessment system has produced are identified 5.2 The assessment system is reviewed 5.3 Recommendations for change to the assessment system are made 5.4 A report is produced and circulated 5.5 The existing assessment system on the basis of responses to the report is revised | 5.1 Communication techniques 5.2 Assessment system features and procedures 5.3 Enterprise policies and procedures 5.4 Standards for organizational recordkeeping and audit requirements 5.5 Quality assurance procedures 5.6 Preparation of report | 5.1 Questioning and communication skills 5.2 Research skills 5.3 Analytical skills 5.4 Ability to research industry information sources 5.5 Networking skills 5.6 Reviewing the assessment system |

| VARIABLE                      | RANGE   |
|-------------------------------|---|
| 1. Purpose of the assessment  | May include:  |
| system                        | 1.1 Recognizing current competencies  |
|                               | 1.2 Identifying training needs of staff   |
|                               | 1.3 Maintaining workplace skill levels  |
|                               | 1.4 Diagnosing employee workplace performance   |
|                               | 1.5 Classifying workers in relation to remuneration levels  |
|                               | 1.6 Assisting in confirming staff competencies in relation to proposed promotion and/or job re-location |
|                               | 1.7 Issuing internal certificates/awards  |
|                               | 1.8 Confirming progress in learning   |
| 2. Assessment system features | May include:  |
| and procedures                | 2.1 Establishing minimum requirements for   |
| •                             | competencies and certification of assessors   |
|                               | 2.2 Record keeping system requirements, including   |
|                               | procedures and policies, and the development  |
|                               | of supporting documentation   |
|                               | 2.3 Timing and duration arrangements for  |

| VARIABLE  | RANGE  |
|---|--|
|   | assessments, including need to integrate assessment with operational issues while maintaining the flexibility and integrity of the internal training and assessment system  2.4 Allowable adjustments to assessments for participants, including language, literacy and innumeracy requirements and the inclusion of candidate assistants  2.5 Access and equity considerations  2.6 Legislated requirements of the host country in relation to employment, workplace safety, workplace licensing requirements and equal opportunity, where applicable  2.7 Arrangements for recognition of competencies gained via other training providers  2.8 Location of assessments, including in-house and external assessment, where applicable  2.9 Review and evaluation processes for assessment procedures  2.10 Enterprise policies and procedures related to assessment, including grievances, reassessment and the relationship between |
| 3. Relevant stakeholders                              | competency and remuneration  May include: 3.1 Trainers and assessors, including external trainers and assessors, where applicable 3.2 Team leaders, supervisors, managers and business owners 3.3 Training and assessment coordinators, where applicable 3.4 Candidates, including a representative sample of past candidates and existing learners 3.5 Technical experts, relative to specialist areas in which assessments are conducted   |
| Procedures for keeping relevant stakeholders informed | May include:  4.1 Regular scheduled meetings specific to assessment issues, including the use of special meetings as the need dictates  4.2 Standing agenda item at all staff meetings regarding assessment issues  4.3 Preparation of a dedicated newsletter, either paper-based or electronic format   |

| VARIABLE                           | RANGE  |
|------------------------------------|--|
|                                    | 4.4 Development of an internal network of assessors  |
| 5. Required competency standards   | May include: 5.1 Externally imposed accredited competency standards as required by training providers and other relevant agencies, where relevant 5.2 Internally described competencies, which may or may not include formal assessor qualifications 5.3 Currency of qualifications 5.4 Relevance of industry experience to the areas being assessed   |
| 6. Required training for assessors | <ul> <li>May include:</li> <li>6.1 Externally provided accredited training, including initial assessor training and identified additional training, where relevant</li> <li>6.2 Provision of refresher training for assessors who have been identified as requiring such training</li> <li>6.3 Providing gap training for assessors on the basis of identified need</li> <li>6.4 Provision of job-specific training to enable assessors to assess areas with which they are not familiar</li> </ul>  |
| 7. Moderation of assessments       | May include: 7.1 Analysing results of assessments with a view to identifying issues that require attention 7.2 Developing a standard assessment matrix against which to conduct assessments 7.3 Confirming the material that will be counted as evidence for the purpose of making a decision regarding candidate competency 7.4 Confirming the operation of internal assessments against external requirements 7.5 Evaluating assessment methods and tools 7.6 Modifying existing assessment arrangements on the basis of valid conclusions reached as a result of the moderation process |
| 8. Feedback to assessors           | May include: 8.1 Analysing their assessments, including results and materials/tools as part of the assessment process 8.2 Developing feedback instruments for candidates to complete following assessments   |

| VARIABLE  | RANGE   |
|---|---|
|   | 8.3 Providing observation sessions while assessors conduct assessments 8.4 Identifying specific foci for evaluation and feedback 8.5 Encouraging self-evaluation as part of the feedback process 8.6 Recognising effort and positive outcomes 8.7 Supporting assessors where feedback identifies negative outcomes  |
| 9. Internal records required to support the assessment system | May include:  9.1 Personal information relating to candidates  9.2 Evidence that required training has been delivered prior to assessment being attempted  9.3 Assessment tools and assessment items  9.4 Copies of relevant training curricula/training plans  9.5 Training rolls  9.6 Evidence captured as part of the assessment process  9.7 Documentation used to record the resources used and costs involved as part of the assessment process                             |
| 10.The requirements for completing the assessment records     | May include: 10.1 Explaining record keeping requirements to assessors 10.2 Providing examples of acceptable records 10.3 Monitoring the compilation of records completed by assessors on an on-going basis 10.4 Highlighting applicable time-related issues that apply to the completion, collection and forwarding of assessment records, including forwarding to internal locations 10.5 Defining the security and confidentiality arrangements that assessors must comply with |
| 11.Assessment records   | May include: 11.1 Creating a dedicated filing system for assessment records, such as paper-based, electronic or a combination of both 11.2 Complying with external requirements relating to filing of assessment records 11.3 Maintaining security and confidentiality of assessment records  |

| VARIABLE  | RANGE   |
|---|---|
|   | 11.4 Enabling easy access to existing records 11.5 Enabling easy up-dating of records and files 11.6 Integrating assessment records with training records in keeping with identified internal requirements 11.7 Establishing processes to enable validation of assessment records   |
| 12.Quality assurance procedures for the assessment system | May include:  12.1 Identification of relevant documentation 12.2 Establishment of relevant benchmarks 12.3 Identification of appropriate 'best practice' as it applies to the enterprise, including any externally imposed 'best practice' requirements 12.4 Nomination of relevant timeframes, including timelines for remitting results, forwarding documentation, undertaking reviews, conducting audits 12.5 Identification of specific quality assurance procedures that apply to assessments, including development of a formal quality assurance section dedicated to assessment and training, where appropriate 12.6 Communication to assessors of the quality assurance requirements, including training relevant to the implementation of identified procedures |
| 13.Internal audits of the assessment system               | May include:  13.1 Scheduling audits  13.2 Defining the topics that will be addressed at each audit, including the possibility of cyclical audits and full audits  13.3 Training staff in undertaking audits  13.4 Allocating resources for the conduct of audits  13.5 Designing and/or obtaining necessary documentation to record audit information/data  13.6 Capturing audit information  13.7 Ensuring captured data allows satisfactory analysis and evaluation of identified topics/areas, including the gathering of supplementary information as  |

| VARIABLE                                    | RANGE  |
|---|--|
|   | necessary  |
| 14. The results of quality assurance audits | May include:  14.1 Ensuring recommendations for change are based on hard evidence  14.2 Applying audit results to all aspects of the assessment system, including documentation and record keeping, assessment methods and tools, assessors, timing and duration of assessments, locations used for assessments  14.3 Revising written policies and procedures to reflect changes, including confirming changes with management, and advising trainers and assessors as appropriate in relation to the changes.  14.4 Identify the outcomes that the assessment system has produced may relate to:  14.5 Aligning outcomes with identified purposes of the assessment system  14.6 Quantifying the benefits that the assessment system has brought to the enterprise, including identification of competencies attained, certificates issued, examples of flexibility and options that assessment has provided to the business |
| 15. Assessment system                       | May include:  15.1 Comparing actual outcomes with identified key performance indicators established for the assessment system, where applicable  15.2 Reviewing performance of assessors  15.3 Reviewing effectiveness of assessment tools and methods  15.4 Detailing the expenses that were incurred in implementing the assessment system  15.5 Reviewing complaints and grievances lodged by candidates  15.6 Quantifying and evaluating the number of reassessments required  15.7 Integrating qualitative feedback from assessors and candidates on the operation of the assessment system   |

| VARIABLE                       | RANGE   |
|--------------------------------|---|
| 16. Recommendations for change | May include: 16.1 Continuing with the existing assessment system, including implementation of minor modifications to accommodate identified issues 16.2 Expanding the existing assessment system 16.3 Reducing the scope of the existing assessment system 16.4 Winding up the existing assessment system, including movement to total assessment service provision by external providers |
| 17. Existing assessment system | May include: 17.1 Revising assessment-related policies and procedures 17.2 Revising assessment tools 17.3 Revising assessment times and locations 17.4 Communicating changes to the assessment system to relevant stakeholders, including the provision of training, as appropriate   |

| EVIDENCE GUIDE                    |   |
|-----------------------------------|---|
| 1. Critical aspects of Competency | <ul> <li>Assessment requires evidence that the candidate:</li> <li>1.1 Understood host enterprise policies and procedures in regard to training and assessment</li> <li>1.2 Demonstrated ability to identify the purpose(s), features and procedures for a nominated assessment system</li> <li>1.3 Demonstrated ability to generate effective procedures to enable communication of key features of a nominated assessment system with relevant stakeholders</li> <li>1.4 Demonstrated ability to provide support for assessors in a nominated workplace context, including: <ul> <li>Verified assessors meet stated competency requirements</li> <li>Identified whether training assessors may need to attain required assessor competencies</li> <li>Arranged and supervised an identified moderation session of the candidate's choosing</li> <li>Provided verbal feedback to one assessor on their work-related assessment performance</li> </ul> </li> <li>1.5 Demonstrated ability to identify and develop appropriate, effective and comprehensive internal assessment records for a nominated workplace context, including:</li> </ul> |

|                             | <del>-</del>  |  |
|-----------------------------|---|--|
| 2. Resource<br>Implications | <ul> <li>Description of how assessors would be advised on how to complete and maintain such records</li> <li>Description of the filing system to be used by assessors to store such records</li> <li>1.6 Demonstrated ability to identify and apply quality assurance procedures to a nominated workplace assessment system</li> <li>1.7 Demonstrated ability to prepare a comprehensive report that outlines the contribution that a nominated workplace assessment system has made to enterprise training and overall business performance</li> <li>The following resources MUST be provided:</li> <li>2.1 Access to a real or simulated workplace</li> <li>2.2 Access to workplace standards, procedures, policies, guidelines, tools and equipment</li> </ul> |  |
| 3. Methods of Assessment    | Competency in this unit may be assessed through:  3.1 Observation of practical candidate performance 3.2 Oral and written questions 3.3 Portfolio evidence, including copies of assessment and training policies and procedures, assessment tools, assessment records, feedback forms relating to assessment, samples of evidence captured, reports and recommendations on the assessment system 3.4 Third party reports completed by a supervisor 3.5 Project and assignment work  |  |
| Context for     Assessment  | 4.1 Competency may be assessed in actual workplace or at the designated TESDA Accredited Assessment Center  |  |

### **CORE COMPETENCIES**

**UNIT OF COMPETENCY** : CONDUCT RESEARCH ON BEVERAGE

**DEVELOPMENT** 

**UNIT CODE** : AB-TRS1380600513301

: This unit covers the skills, knowledge, and attitude required to gather and process data relevant to beverage concepts. **UNIT DESCRIPTOR** 

| ELEMENT                  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED SKILLS  |
|--------------------------|---|--|--|
| 1. Gather data           | <ul> <li>1.1 Beverage concepts are identified based on the recent trends and target market.</li> <li>1.2 Gathering methods are applied according to industry practice.</li> <li>1.3. Gathered data is organized according to the beverage concepts.</li> </ul>  | Science  | 1.1 Identifying<br>beverage concepts<br>1.2 Applying<br>gathering methods<br>1.3 Organizing<br>gathered data   |
| 2. Process gathered data | <ul> <li>2.1 Validity of data is assessed using industry practice.</li> <li>2.2 Analysis techniques are applied to assess data based on industry standards.</li> <li>2.3 Trends and anomalies are identified according to industry standards.</li> <li>2.4 <i>Data analysis techniques</i> are applied according to industry standards.</li> <li>2.5 Recommendations are prepared based on the result of analysis.</li> </ul> | Technology 2.1 Assessment of data validity 2.2 Application of analysis techniques 2.3 Identification trends and anomalies 2.4 Data analysis techniques/procedures 2.5 Preparation of recommendation  Communication 2.1 Reporting requirements to a range of audiences 2.2 Legislation, policy and procedures relating to the conduct of evaluations 2.3 Organizational values, ethics and codes of conduct | 2.1 Assessing validity of data 2.2 Applying analysis techniques 2.3 Identifying trends and anomalies 2.4 Applying data analysis techniques 2.5 Preparing recommendations . 2.6 Computing business mathematics and statistics 2.7 Analyzing Skills 2.8 Describing data analysis techniques/ procedures 2.9 Reporting requirements to a range of audiences |

| ELEMENT | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables | REQUIRED<br>KNOWLEDGE                               | REQUIRED SKILLS  |
|---------|--|---|--|
|         |  | Mathematics 2.4 Business mathematics and statistics | 2.5 Stating legislation, policy and procedures relating to the conduct of evaluations 2.6 Stating organizational values, ethics and codes of conduct |

| VARIABLE                    | RANGE  |
|-----------------------------|--|
| Beverage concepts           | May include but not limited to: 1.1 Cocktails 1.2 Mocktails 1.3 Coffee 1.4 Wines 1.5 Non-alcoholic beverages |
| 2. Data analysis techniques | May include but not limited to: 1.1 Domain analysis 1.2 Content analysis 1.3 Comparison technique            |

| Critical aspects of competency | Assessment requires evidence that the candidate: 1.1 Gathered data 1.1.1 Identified beverage concept based on the recent trends and target market. 1.1.2 Collected evidence, facts and information 1.2 Processed gathered data 1.2.1 Identified trends and anomalies 1.2.2 Documented data analysis techniques and procedures |
|--------------------------------|---|
| 2. Resource Implications       | The following resources MUST be provided: 2.1 Simulated or actual workplace 2.2 Tools, equipment, materials and supplies needed to demonstrate the required tasks 2.3 References and manuals / modules 2.4 First aid kit 2.5 Fire extinguisher  |
| 3. Methods of Assessment       | Competency in this unit may be assessed through: 3.1 Written/Online examination 3.2 Demonstration/observation with oral questioning 3.3 Case study  |
| Context for     Assessment     | 4.1 Competency may be assessed individually in the actual workplace or simulation environment in TESDA registered institutions.   |

UNIT OF COMPETENCY : DEVELOP BEVERAGES

UNIT CODE : AB-TRS1380600513302

**UNIT DESCRIPTOR**: This unit covers the skills, knowledge, and attitude required to

produce beverage samples, perform beverage ingredients and product trials, prepare sell sheets, and recommend

beverage products for menu inclusion.

| ELEMENT                     | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE   | REQUIRED<br>SKILLS  |
|-----------------------------|--|---|---|
| 1. Produce beverage samples | <ul> <li>1.1 Alcoholic and non-alcoholic beverages, consumables and general supplies are segregated based on company requirements.</li> <li>1.2 Beverage ingredients are used for beverage sample creation based on recommendation.</li> <li>1.3 Equipment, tools, glassware, supplies, materials and consumables are prepared according to industry procedures and requirements</li> <li>1.4 Workstation is prepared according to industry procedures and requirements</li> <li>1.5 Base alcoholic and non-alcoholic beverages are selected based on the beverage concept</li> <li>1.6 Beverage mixers are selected based on the beverage concept</li> <li>1.7 Mixing techniques for alcoholic and non-alcoholic and non-alcoholic beverages</li> </ul> | Technology 1.1 Health, Safety, and Hygiene standards 1.2 Safety handling and usage of tools and equipment 1.3 Proper equipment layout 1.4 Procedures in preparing equipment and tools for coffee station 1.5 Procedures in preparing equipment and tools for wine station 1.6 Procedures in preparing equipment and tools for bar station 1.7 Coffee ingredients 1.8 Sensory reflex 1.9 Procedures in making coffee recipes 1.10 Procedures in making coffee recipes 1.10 Procedures in making alcoholic and non — alcoholic beverage | 1.1 Segregating alcoholic and non-alcoholic beverages, consumables and general supplies 1.2 Using beverage ingredients 1.3 Preparing equipment, tools, glassware, supplies, materials and consumables 1.4 Preparing workstation 1.5 Selecting base alcoholic-and non-alcoholic beverages 1.6 Selecting beverage mixers 1.7 Applying mixing techniques for alcoholic and non-alcoholic beverages 1.8 Applying health and safety requirements 1.9 Troubleshooting of equipment 1.10 Sorting skills 1.11Bartending, Barista and Sommelier Skills 1.12 Decision Making skills 1.13 Sorting Skills |

| ELEMENT | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS |
|---------|--|--|--------------------|
|         | are applied based on the beverage concept                                      | 1.11Mixing techniques  Communication 1.12 Company and workplace requirements  Science 1.13 Alcoholic and non-alcoholic beverages, consumables and supplies 1.14 Beverage ingredients 1.15 Equipment, tools, glassware, supplies, materials and consumables 1.16 Workstation component 1.17 Base alcoholic and non-alcoholic 1.18 Beverage mixers |                    |

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables   | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS  |
|--|--|--|---|
| 2. Perform beverage ingredients and product trials | 2.1 Characteristics of beverage ingredients are evaluated according to the requirements of the proposed beverage concept 2.2 Beverage samples are tested based on the proposed beverage concept 2.3 Beverage ingredients and product results are analyzed according to the beverage concept 4.2 Accomplishment of the evaluation sheets are facilitated based on the company requirements. | Science  2.1 Characteristics of beverage ingredients  2.2 Beverage samples  Technology  2.3 Procedures in making alcoholic and non – alcoholic beverages  2.4 Wine Service  2.5 Health, Safety, and Hygiene standards  2.6 Safety handling and usage of tools, equipment and ingredients  2.7 Quality of ingredients  2.8 Testing of beverage samples  2.9 Analysis of beverage ingredients and product results  Communication  2.10 Accomplishment of the evaluation sheets  2.11 Company and Workplace requirements  2.12 Sensory reflex | 2.1 Evaluating characteristics of beverage ingredients 2.2 Testing beverage samples 2.3 Analyzing basic ingredients and product results 2.4 Accomplishing evaluation sheet 2.1 Applying health and safety requirements 2.2 Sorting Skills 2.3 Applying sensory reflex 2.4 Preparing coffee recipes 2.5 Wine evaluation Skills 2.6 Bartending, Barista and Sommelier Skills beverages 2.7 Decision making skills |
| 3. Prepare sell sheet                              | 3.1 Costs of the developed beverage products are determined based on the <i>incurred</i> expenses  | Science 3.1 Beverage sell sheet  Mathematics   | <ul><li>3.1 Determining costs of developed beverage products</li><li>3.2 Preparing beverage sell sheet.</li></ul>   |

| ELEMENT  | PERFORMANCE CRITERIA Italicized terms are elaborated in the Range of Variables  | REQUIRED<br>KNOWLEDGE  | REQUIRED<br>SKILLS   |
|--|---|--|--|
|  | 3.2 Beverage sell sheet is prepared based on company requirement.   | 3.2 Costing of developed beverage products  Communication 3.3 Company and workplace requirements  Science 3.4 Coffee ingredients 3.5 Wine Varieties, Alcoholic and Non-Alcoholic Beverages  Technology 3.6 Procedures in making coffee recipes 3.7 Procedures in making alcoholic and non-alcoholic beverages 3.8 Preparation of | 3.3 Bartending, Barista and Sommelier Skills 3.4 Decision making skills 3.5 Critical thinking skills 3.6 Basic mathematical skills   |
| 4. Recommend beverage product for menu inclusion | 4.1 Alcoholic and non- alcoholic beverages for inclusion in the menu are identified based on the beverage concept  4.2 Alcoholic and non- alcoholic beverages are categorized based on beverage concept and company requirements  4.3 Designed menu is recommended for approval | Science 4.1 Alcoholic and non-alcoholic beverages 4.2 Categories of alcoholic and non-alcoholic beverages  Technology 4.3 Identification of beverages for menu inclusion 4.4 Designing menu  Communication 4.5 Company and workplace requirements  | 4.1 Identifying alcoholic and non-alcoholic beverages for menu inclusion  4.2 Categorizing alcoholic and non-alcoholic beverages  4.3 Recommending designed menu  4.4 Sorting Skills  4.5 Decision making skills |

| VARIABLE VARIABLES  | RANGE   |
|---|---|
| Alcoholic and non-alcoholic beverages, consumables and general supplies | May include but not limited to:  1.1 Alcoholic Beverages:  1.1.1 Spirits/Liquors  1.1.2 Liqueurs  1.1.3 Beers  1.1.4 Wines  1.2 Non-Alcoholic Beverages:  1.2.1 Fresh Fruit Juices  1.2.2 Syrups  1.2.3 Sodas/Carbonated drinks  1.2.4 Milk/Cream  1.2.5 Coffee  1.2.6 Tea  1.2.7 Water (Still or Sparkling)  1.3 Consumables:  1.3.1 Spices  1.3.2 Herbs  1.3.3 Fruits  1.3.4 Vegetables  1.3.5 Preserved fruits and vegetables  1.4 General Supplies  1.4.1 Straws  1.4.2 Coasters  1.4.3 Table napkins  1.4.4 Cocktail picks  1.4.5 Stirrers |
| 2. Equipment, tools, glassware, supplies, and materials and consumables | May include but not limited to: 2.1 Equipment 2.1.1 Espresso machine 2.1.2 Espresso grinder 2.1.3 Percolator 2.1.4 Brewer 2.1.5 Filter Grinder 2.1.6 Chiller 2.1.7 Blender 2.1.8 Ice Bin 2.1.9 Glass Chiller 2.1.10 Draft Beer Dispenser 2.1.11 Refrigerator 2.1.12 Freezer 2.1.13 Kettle 2.1.14 Blender 2.1.15 Sink 2.1.16 Undercounter Chiller  |

| VARIABLE | RANGE   |
|----------|---|
|          | 2.1.17 Glass washer                                       |
|          | 2.1.18 Clear ice machine                                  |
|          | 2.1.19 Nugget ice machine                                 |
|          | 2.1.20 Dehydrator   |
|          | 2.1.21 Sous vide machine                                  |
|          | 2.1.22 Vacuum sealer                                      |
|          | 2.1.23 Wine chiller                                       |
|          | 2.2 Tools   |
|          | 2.2.1 Weighing Scales                                     |
|          | 2.2.2 Knock Box   |
|          | 2.2.3 Portafilters  |
|          | 2.2.4 Portafilter Baskets                                 |
|          | 2.2.5 Steaming Pitchers                                   |
|          | 2.2.6 Tamper  |
|          | 2.2.7 Timer   |
|          | 2.2.8 Tamping Pad   |
|          | 2.2.9 Measuring Cups                                      |
|          | 2.2.10 Paper & Metal Filters                              |
|          | 2.2.11 Large Tub  |
|          | 2.2.12 Cheesecloth  |
|          | 2.2.13 Pitchers   |
|          | 2.2.14 Cold Drip Tower                                    |
|          | 2.2.15 Corkscrew  |
|          | 2.2.16 Durand   |
|          | 2.2.17 Polishing cloth                                    |
|          | 2.2.18 Service cloth                                      |
|          | 2.2.19 Ice bucket and stand                               |
|          | 2.2.20 Wine bottle cradle                                 |
|          | 2.2.21 Decanter   |
|          | 2.2.22 Metal funnel                                       |
|          | 2.2.23 Cocktail Shaker (tin on tin, tin on glass, cobbler |
|          | parisian)   |
|          | 2.2.24 Mixing Vessel                                      |
|          | 2.2.25 Hawthorne Strainer                                 |
|          | 2.2.26 Julep Strainer                                     |
|          | 2.2.27 Mesh Cone Strainer                                 |
|          | 2.2.28 Barspoon (trident, teardrop, flat-disk/hammer)     |
|          | 2.2.29 Muddler (wood, metal, fiber)                       |
|          | 2.2.30 Jiggers (cone, japanese, bell, universal)          |
|          | 2.2.31 Speed Pourers                                      |
|          | 2.2.32 Bottle Opener / Bottle Blade                       |
|          | 2.2.33 Citrus Press / Juicer                              |
|          | 2.2.34 Peeler   |
|          | 2.2.35 Zester   |
|          | 2.2.36 Bar blade  |

| VARIABLE       | RANGE   |
|----------------|---|
|                | 2.2.37 Ice molder   |
|                | 2.2.38 Atomizer   |
|                | 2.2.39 Bitter bottles   |
|                | 2.2.40 Dropper bottles  |
|                | 2.2.41 Rimmer   |
|                | 2.2.42 Garnish Tong   |
|                | 2.2.43 Ice Tong   |
|                | 2.2.44 Pocket Torch   |
|                | 2.2.45 Matchsticks  |
|                | 2.2.46 Cocktail brush   |
|                | 2.2.47 Smoking gun  |
|                | 2.2.48 Soda syphon  |
|                | 2.3 Supplies/Materials/Consumables  |
|                | 2.3.1 Coffee Beans  |
|                | 2.3.2 Milk  |
|                | 2.3.3 Consumables (sugar, creamer, etc)   |
|                | 2.3.4 Chocolate Powder for Mocha  |
|                | 2.3.5 Matcha Powder for Dirty Matcha<br>2.3.6 Chai  |
|                | 2.3.7 Fruits  |
|                | 2.3.8 Juices  |
|                | 2.3.9 Sugar   |
|                | 2.3.10 Pepper   |
|                | 2.3.11 Sodas  |
|                | 2.4 Glassware   |
|                | 2.4.1 Universal/White wine glass  |
|                | 2.4.2 Champagne flute   |
|                | 2.4.3 Red wine Glass  |
|                | 2.4.4 Bordeaux Glass  |
|                | 2.4.5 Burgundy Glass  |
|                | 2.4.6 Sweet wine Glass  |
|                | 2.4.7 Cocktail Coupe  |
|                | 2.4.8 Martini Glass   |
|                | 2.4.9 Margarita Glass   |
|                | 2.4.10 Single Rocks Glass   |
|                | 2.4.11 Double Rocks Glass   |
|                | 2.4.12 Highball Glass   |
|                | 2.4.13 Shot Glass   |
|                | 2.4.14 Tiki Glass   |
|                | 2.4.15 Coffee Vessels with underliners (demitasse, 6                                      |
|                | oz. cups, 8 oz. cups, 12 oz. glass, 16 oz. glass, 22 oz<br>glass, 4.5 oz Gibraltar glass) |
| 3. Workstation | May include:  |
|                | 3.1 Cafe  |
|                | 3.2 Wine Service Station  |

| VARIABLE VARIABLES                             | RANGE  |
|--|--|
|  | 3.3 Bar  |
| 4. Beverage Mixers                             | May include but not limited to: 4.1 Fruits 4.2 Juices 4.3 Soda 4.4 Sugar 4.5 Spices 4.6 Dairy Products 4.7 Herbs 4.8 Syrups 4.9 Vegetables 4.10 Wines 4.11 Liqueurs 4.12 Beer 4.13 Tea 4.14 Coffee 4.15 Milk 4.16 Dairy products |
| 5. Mixing Techniques                           | 4.17 Preservatives 4.18 Bottled Water  May include but not limited to: 5.1 Shaking 5.2 Stirring 5.3 Measuring 5.4 Pouring 5.5 Muddling 5.6 Straining 5.7 Swirling  |
| 6. Characteristics of the beverage ingredients | May include but not limited to: 6.1 Flavor 6.2 Texture 6.3 Aroma 6.4 Nutritional Value 6.5 Shelf Life 6.6 Appearance 6.7 Sustainability 6.8 Food Safety  |
| 7. Incurred Expenses                           | May include but not limited to: 7.1 Applicable Taxes 7.2 Suggested Retail Price (SRP) 7.3 Cost of Goods  |

| 4 0 (0 a) 1 a a a a a a        | A  |
|--------------------------------|--|
| Critical aspects of competency | Assessment requires evidence that the candidate:  1.1 Produced beverage samples  1.1.1 Segregated alcoholic and non-alcoholic beverages, consumables and general supplies  1.1.2 Used beverage ingredients for beverage sample creation  1.1.3 Prepared equipment, tools, glassware, supplies, materials and consumables  1.1.4 Prepared workstation  1.1.5 Selected Base alcoholic or non-alcoholic beverages  1.1.6 Selected beverage mixers  1.1.7 Applied mixing techniques for alcoholic and non-alcoholic beverages  1.2 Performed beverage ingredients and product trials  1.2.1 Evaluated characteristics of beverage ingredients  1.2.2 Tested beverage samples  1.2.3 Analyzed beverage ingredients and product results  1.2.4 Facilitated accomplishment of the evaluation sheets  1.3 Prepared sell sheets  1.3.1 Determined cost of the developed beverages  1.4 Recommended beverage products for menu inclusion  1.4.1 Identified Alcoholic and non-alcoholic beverages |
|                                | for inclusion in the menu  1.4.2 Categorized Alcoholic and non-alcoholic   |
|                                | beverages 1.4.3 Recommended designed menu  |
| 2. Resource Implications       | The following resources MUST be provided: 2.1 Simulated or actual workplace 2.2 Tools, equipment, materials and supplies needed to demonstrate the required tasks 2.3 References and manuals / modules 2.4 First aid kit 2.5 Fire extinguisher   |
| 3. Methods of Assessment       | Competency in this unit may be assessed through: 3.1 Written/Online examination 3.2 Demonstration/observation with oral questioning 3.3 Case Study   |
| 4. Context for Assessment      | 4.1 Competency may be assessed individually in the actual workplace or simulation environment in TESDA registered institutions   |

# **GLOSSARY OF TERMS**

| 1) Mixology         | The art of creating and mixing drinks.   |
|---------------------|--|
| 2) Mixologist       | Someone who studies, creates and regularly innovates using different bartending techniques when making a drink.      |
| 3) Cocktail         | Mixed drink made with a combination of spirits, any kind of sugar, water and herbs.                                  |
| 4) Mocktail         | Non-alcoholic mixed drink made, meant to replicate the presentation of a cocktail.                                   |
| 5) Spirit           | Alcoholic beverages that are distilled, such as vodka, rum, whiskey, brandy, gin and tequila.                        |
| 6) Liquor           | Commonly used as a name for any type of alcohol.   |
| 7) Liqueur          | Sweetened distilled alcohol/spirit that are flavored with herbs, fruits, spices or other natural flavors.            |
| 8) Shot/Pony        | A small serving of straight spirits, usually about 30ml.   |
| 9) Dram             | Measures at 1/8 oz or less than a teaspoon of whiskey.   |
| 10) Neat            | A spirit served without ice directly poured in a glass.  |
| 11) On The Rocks    | A spirit served in glass with ice.   |
| 12) Served Up       | A shaken or stirred cocktail, strained and served in a glass without ice.  |
| 13) Base Spirit     | A cocktail component that should be at least 50% above in volume. (ex.: gin, rum, whiskey, etc)                      |
| 14) Modifying Agent | A cocktail component that smooths down the sharpness of liquor and to balance the taste (ex: citrus and syrup)       |
| 15) Vodka           | Distilled spirit made from grains or any starch containing ingredient (ex: potatoes)                                 |
| 16) Gin             | Distilled neutral spirit made from juniper berries and other botanicals.   |
| 17) Rum             | Distilled spirit made from sugarcane byproduct of molasses.  |
| 18) Tequila         | Distilled spirit made from a blue agave plant.   |
| 19) Brandy          | Distilled spirit made from wine or other fruit juices.   |
| 20) Cognac          | A variety of Brandy that is strictly made from the wine region of Cognac, France.                                    |
| 21) Armagnac        | A variety of Brandy that is strictly made from the wine region of Armagnac, France.                                  |
| 22) Bourbon         | A type of Whiskey made primarily from at least 51% corn.   |
| 23) Scotch          | A type of Whiskey made from malted barley, produced in Scotland.   |
| 24) Rye             | A type of Whiskey made primarily from at least 51% rye.  |
| 25) Mezcal          | A type of Tequila which is made from a variety of agave and has a smoky character.                                   |
| 26) Pisco           | An unaged brandy produced in Peru and Chile.   |
| 27) Cachaca         | Distilled neutral spirit made from sugarcane juice produced exclusively in Brazil.                                   |
| 28) Aperitivo       | A ritual celebrated in Italy with consumption of food, drinks & sociability. Campari and Aperol are known aperitifs. |
| 29) Wine            | Alcoholic beverage made by fermenting grape juice.   |

| 30) Sparkling Wine        | A wine made with the additional method of "secondary   |
|---------------------------|--|
| co, chamming time         | fermentation" producing sparkling or fizz effect.  |
| 31) Still Wine            | A wine made without effervescence.   |
| 32) Dessert Wine          | A wine that is typically very sweet and served with dessert.   |
| 33) Fortified Wine        | A wine that contains a distilled spirit, such as brandy.   |
| 34) Sommelier             | A wine Steward   |
| 35) Barista               | Is someone who makes and/or serves coffee and coffee-based beverages. These can include espresso and espresso-based drinks as well as filter and brewed coffees.   |
| 36) Espresso              | It is a concentrated coffee beverage made when hot water is forced through finely-ground coffee beans of about 9 bars of pressure with a coffee to liquid ratio of 1:2 that produces a robust, rich and flavorful beverage of approximately 1 ounce and is used as the base for beverages such as lattes, cappuccinos etc.   |
| 37) Filter Coffee         | It is a coffee beverage made by slowly poured hot water through coarsely-ground coffee beans in a coffee filter  |
| 38) Coffee Bean           | It is a seed of the Coffea plant and the source for coffee. It is the pip inside the coffee cherry fruit. They are technically not beans but referred as such for its resemblance to true beans. Species are arabica, robusta liberica and excelsa   |
| 39) Arabica Coffee Beans  | It is a coffee bean that comes from the Coffea Arabica plant and grown at high-altitudes and is the most widely consumed coffee making up approximately 60% of the world's coffee production due to its smoother, sweeter and more nuanced flavors than other coffee species, with common notes of fruit, chocolate, nuts and molasses. They contain less caffeine and are more acidic, making them less bitter and easier to drink. |
| 40) Robusta Coffee Beans  | It is a coffee bean from the Coffea Canephora Plant and is used primarily in instant coffee and parts of blends for espresso and filter coffee. It contains more caffeine and less sugar than arabica and produces stronger and harsher tastes.  |
| 41) Liberica Coffee Beans | It is a coffee bean from the Coffea Liberica and is easily distinguished for its larger size and irregular teardrop shape. It produces flavors often described as smoky, nutty, floral with hints of dark chocolate, ripe berry and spice.   |
| 42) Excelsa Coffee Beans  | It is from the Coffea Excelsa and is largely used in blends to give coffee an extra boost of flavor and complexity, better affecting the back palate.  |
| 43) Espresso Machine      | It is a machine used to brew coffee by forcing pressurized water near boiling point through a "puck" of finely ground coffee and a filter in order to produce a thick, concentrated coffee called espresso. Original designs include brewing/group heads and portafilters. Modern designs have incorporated other features such as steam wants to steam and texture milk for cappuccinos and/or lattes and also hot water spouts.    |
| 44) Coffee Grinder        | An appliance or tool used to pulverize coffee beans into a fine or coarse powder using flat or conical burrs where grind sizes can be adjusted. There are available electronic or manual versions  |

|                                 | that come in different sizes with some being specific to filter,   |
|---------------------------------|--|
|                                 | espresso or both applications.   |
| 45) Percolator                  | A type of coffee pot where heated water is driven by its boiling action above a porous canister of coffee held above the level of the water in the pot, and then filters back through the coffee to extract its essence.                             |
| 46) Coffee Brewer               | A coffee maker or coffee machine is an appliance used to brew coffee. Most common brewing principles use gravity or pressure to move hot water through coffee grounds.   |
| 47) Weighing Scale (for coffee) | A coffee scale is a device used to measure the weight of coffee and brew water during the extraction process. Main elements measured are the weight of the dose of ground coffee and the weight of yield of brewed beverage.                         |
| 48) Knock Box                   | It is a device used to empty espresso grounds and collect the used pucks of ground coffee after every extraction.  |
| 49) Portafilter                 | An accessory used to hold ground espresso coffee beans that is inserted in a group head in an espresso machine to extract espresso.  |
| 50) Portafilter Baskets         | It is the accessory that sits inside the portafilter that holds the actual coffee grinds. It is equipped with tiny holes which allows water to pass through from the coffee grinds to the cup. They come in various sizes depending on desired dose. |
| 51) Steaming Pitcher            | It is also known as Frothing Pitcher which is used to steam and texture milk to produce foam used for espresso beverages such as latte and cappuccino.   |
| 52) Tamper                      | A barista's tool made up of a handle and base used to pack or "tamp" ground coffee into a portafilter.   |
| 53) Tamping Pad                 | It is a rubber mat shaped to protect the edge and surface of countertops from wear and tear caused by contact between the portafilter and countertops.   |
| 54) Measuring Cups              | A vessel used to measure liquid extractions with common units of measure in milliliters and ounces.  |
| 55) Paper & Metal Filters       | It is a paper or metal cone or bowl used to brew coffee by allowing water through the ground beans.  |
| 56) Ristretto                   | It is similar to an espresso but is differentiated by being a restricted shot with a coffee to liquid ratio of approximately 1:1.  |
| 57) Cappuccino                  | A coffee beverage made with a single shot of espresso as the base and topped with steamed and textured milk with a 10 - 12-millimeter-thick foam with a traditional serving size of 6 oz. filled to the brim.  |
| 58) Flat White                  | A coffee beverage made with 2 shots of espresso as the base and topped with steamed and textured milk with a 2-millimeter-thick foam with a traditional serving size of 8 oz. filled to the brim.  |
| 59) Macchiato                   | A coffee beverage made with 1 or 2 shots of espresso (single or double) at the base and topped with 1-2 dollops of foamed milk and served in a demitasse.  |
| 60) Latte                       | A coffee beverage made with 2 shots of espresso as the base and topped with steamed and textured milk with a 6-millimeter-thick foam with a traditional serving size of 8 oz. filled to the brim.  |

| 61) Piccolo          | A beverage that is traditionally made with 1-part single espresso<br>and 2 parts of steamed and textured milk same as latte and<br>served in small vessels, often glass at 3-4 oz. |
|----------------------|--|
| 62) Cafe Americano   | A beverage made with ¾ cup-filled hot water and topped with a single shot of espresso, served in a 6 oz. cup.  |
| 63) Long Black       | A beverage made with ¾ cup-filled hot water and topped with 2 shots of espresso, served in an 8 oz. cup.   |
| 64) Cortado          | A beverage traditionally made with a shot of espresso as the base and topped with equal volume of steamed and textured milk with foam same as latte.                               |
| 65) Mocha            | A coffee beverage combined with chocolate in sauce, syrup or powder form followed by milk or cream. Many variations and iterations have surfaced.                                  |
| 66) Evaluation Sheet | A tool professionals can use to give and receive feedback. It usually contains questions that help the person to complete the form.  |
| 67) Trends           | A general direction into change, development.  |
| 68) Anomalies        | An irregularity or deviation from the common rule.   |

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