

Building Key Competencies for Life Long Learning in TouriSME

Handbook for Consultants

23.09.15

Working with TouriSME in 6 Steps



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Self-Responsible Learning of Key Competences
in Tourism SME - a Mean to improve
Competitiveness and Employment
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TouriSMEComp

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Self-Responsible Learning of Key Competences
in Tourism SME - a Mean to improve
Competitiveness and Employment
2014-1-RO01-KA202-002766

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- FPIMM Brasov, Romania
- AEVC, Portugal
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- FEPPV, Portugal

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Part 1: Suggested Workflow of Working with TouriSME

Description of Symbols used

General aim of step

Sub-Step

Guideline Chapter

Template/Worksheet

Suggested
Time

Time Σ

General Setup and Process of Consulting

1 consultant

1 partner from TouriSME (1-3 persons)

1 implementation team (internal project team/employees)

Preparation + 6 steps

Implementation phases between consultancy meetings

Getting Started

Step 1

Making Contact and Reviewing Situation



Step 2

Visions and Pathways



Step 3

Operational Learning Needs Analysis -
Discovering Key Competencies for LLL in Tourism



Step 4

Developing Key Competencies for LLL in Tourism



Step 5

Expanding Learning



Step 6

Review and Reflection -
Planning Continuous Improvement of Key Competencies Learning in
TourismSME



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Getting started

Getting started

Preparation of Consultants

Discovering Learning
Needs and Priorities in
TourismSME and
Building a Facilitation
Strategy

Ch. 2.1: Overview of guideline

300 min

Ch. 2.2: Overview of project and objectives

Ch. 2.3: Relevance of Learning for TourismSME
and their Employees

Ch. 2.4: The Opportunities of Workplace Learning

2.4.1 Workplace learning –the adequate

Ch. 2.4.2: Theoretical background

Ch. 2.4.3: Facilitated, systematic learning

Ch. 2.5.4: Appreciative Inquiry in Tourism

Ch. 2.8: Link to IO 1. In national versions: National
Requirement analysis

Step 1

Step 1	Contact and Analysis
--------	----------------------

Aims:

1. Getting to know the hotel or restaurant: challenges and resources , employees, customers etc. (reflection and self reflection)
2. Learning about its current learning practices and learning opportunities
3. Identifying desirable developments

Ch. 2.9 : Notes on the step 1

Ch. 2.7: How to contact companies, occasions for consulting

Ch. 2.4.4: Emotional labour and Labour Productivity

Introduction

Introduction of the Team

Introduction of the project

Talking about the TourismSME

Reflective interview: situation, challenges, employees, opportunities

Visioning the TourismSME I:

What would you like the situation to be three years from now?

Agreement on Process and next Steps

Post Processing

Facilitator writes Feedback paper

Ch.2 11: Background: Drivers and Barriers of Learning in TourismSME

Ch. 2.2: Overview of Project and Objectives

Ch. 2.8: Results of the Analysis of LN of

Ch.2.10: Tool: Interview Guideline

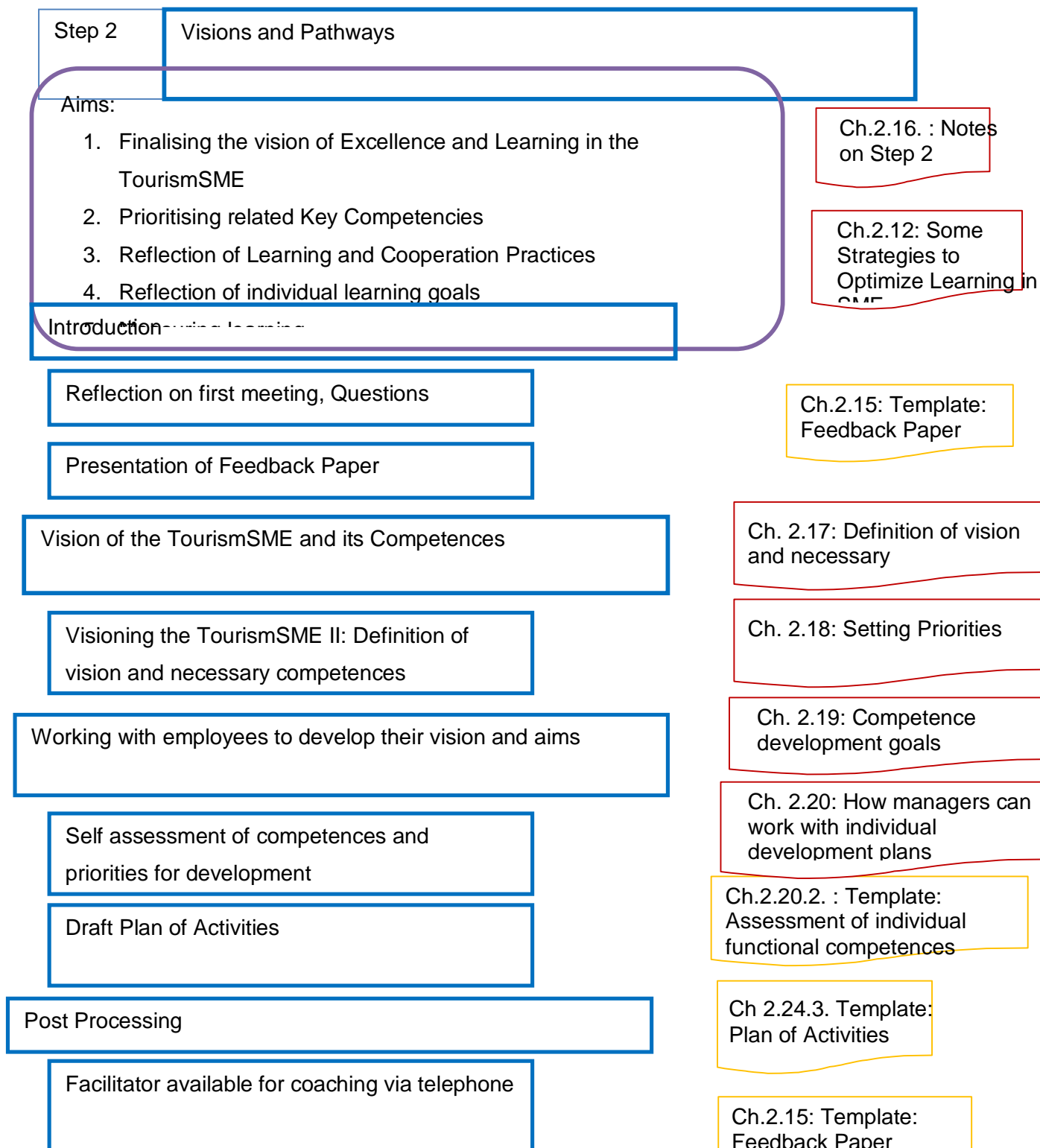
Ch.2.10.1: Tool: SWOT Guideline

Ch. 2.13: Exercise: Visioning

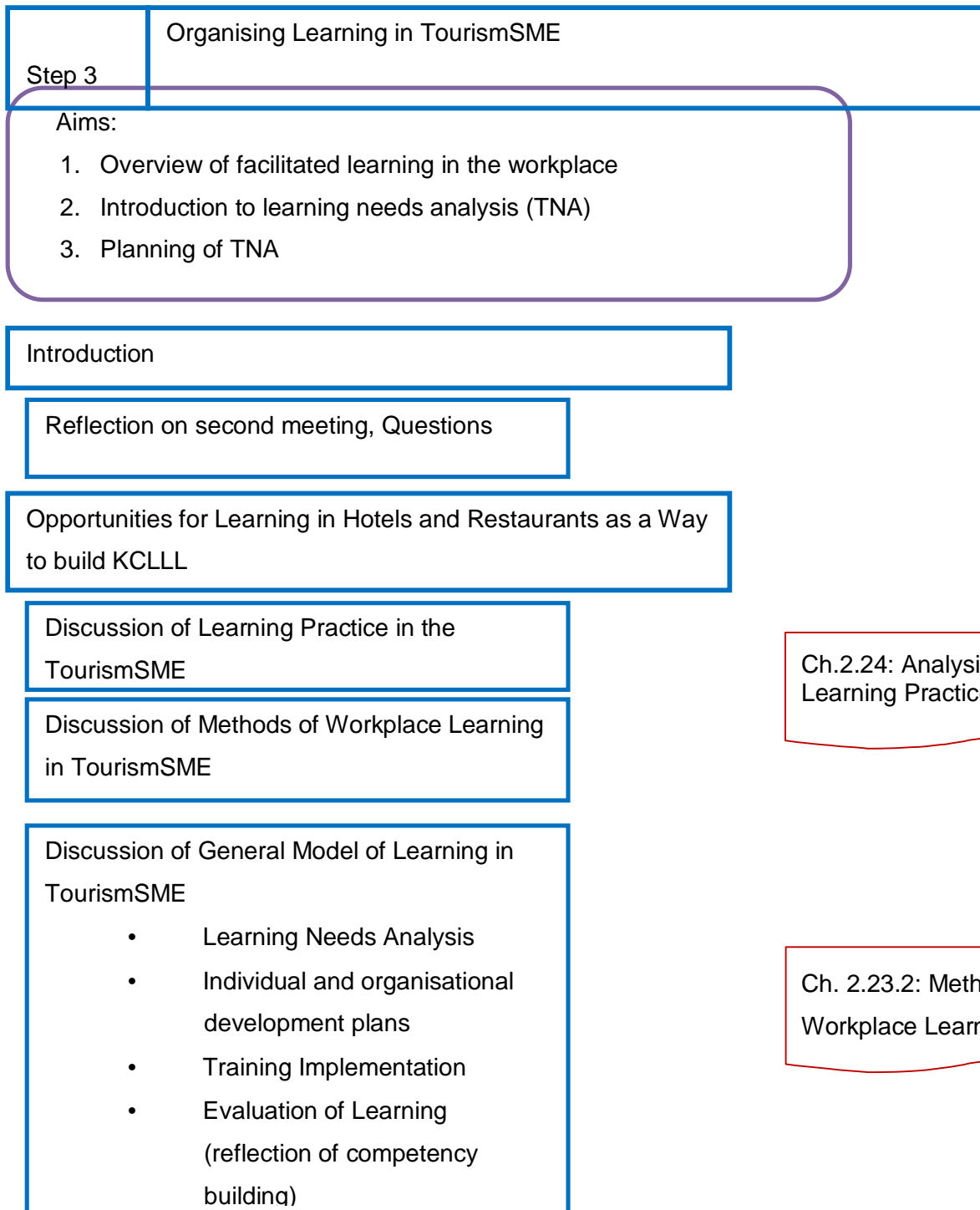
Ch.2.14: Template: Visualisation of next steps

Ch.2.15: Template: Feedback Paper

Step 2



Step 3



Ch.2.24: Analysing Current Learning Practices

Ch. 2.23.2: Methodologies of Workplace Learning

Introduction to Learning Needs Analysis

Discussion of current LNA practice in the TourismSME

Discussion of methodologies of LNA

Agreement on methodologies of LNA

Practicing LNA

Draft Plan of Activities

Post Processing

Facilitator available for coaching via telephone

Manager and TourismSME pilot group implements activities

Ch.2.24.2: Methodologies of Learning Needs Analysis

Ch. 2.24.3: Note on Decision on Methodology of LNA

Ch.2.24.3:Template:
Plan of Activities
TNIA

Ch.2.15: Template:
Feedback Paper

Step 4

Step 4

Building KCLLL in TourismSME

Aims

1. Review of LNA Results
2. Reflecting KC in face of LNA Results
3. Defining Learning Pathways
4. Planning Learning



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Introduction

Reflection of last meeting, news and

Reviewing LNA

Results of LNA

Insights and Surprises

Priorities and Opportunities

Connection of Learning Needs with Key
Competencies

Implementation Planning

Brainstorming of Learning Opportunities

Ch.2.25.3: Brainstorming of
Learning Opportunities

Reflection of work-integrated Learning
Opportunities for the Acquisition of Key
Competences
Review of Learning Modules for Employees

Ch.2.25.3.1: Template
Evaluation form of self-
assessment

Ch.2.25.1: Skills –
Competences –Key
Competences Matrix

Definition of Learning Projects: How should
who learn what from whom until when?

- Learning targets for employees
- Methodological learning targets for
managers

Ch.2.25.3: Making
Learning Plans

Next steps

Next steps and activity planning

Ch.: 2.25.3.2
Template
Development

Post Processing

Facilitator available for coaching via telephone

Manager and TourismSME pilot group
implements activities

Step 5

Step 5	Expanding Learning
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Aims:

1. Reflection of activities
2. Supporting Management Pilot Group
3. Envisioning a Learning System for Developing KCLL in Tourism Employees

Ch.2.26.1: Notes on Structure of Meeting 5

Introduction

Reflection of last meeting, news and questions

Ch.2.26.2: Making Key Competences Develop

Reflecting the Implementation

What happened?
How did employees respond?
What did surprise you?
What could be improved?

2.26.3Template: Reflection on Learning System

Expanding Learning

Discussion:
What is a Competency Development System?

Envisioning a Competency Development System

Discussion:

What should be achieved concerning
employee learning in three years?

How will we achieve that?

How will we include all employees?

How will we make sure that all tasks are
learned adequately?

Post Processing

Facilitator available for coaching via telephone

Manager and TourismSME pilot group
implements activities

Step 6

Step 6	Review and Reflection - Planning Continuous Improvement of Key Competencies Learning in TourismSME
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Aims:

1. Reflection and celebration of process
2. Strategy mapping for 2 year perspective
3. Finding Indicators for 2 years perspective

Introduction

Reflection of last meeting, news and

Reviewing the Implementation

What happened?

Evaluating the Implementation

Implementation vs. indicators and targets
What could be improved?

Expansion of Strategy

Decision making and planning of Activities

Next Steps

Agreement on next steps and eventually
continuation of cooperation, follow-up

Ch.2.27.1: Notes
on Step 6
Reflection and

Post Processing

Facilitator available for coaching by
telephone(Mail)

Part 2: Information on Key Concepts and Didactical Material

2.1: Introduction: Overview of Guideline

The aim of this guideline is to introduce in the consultants practice a new concept regarding the development of human resources in tourism SME.

The 6 steps are detailed in order to help the consultant / facilitator to guide the conversation with the managers more to self- reflection upon the daily activity then to solving current unpleasant situation related to unsatisfied customers.

The materials from part 2 will help the consultants to think more as a facilitator of workplace learning.

The 6 Steps are in fact 6 different meetings with the manager in order to raise the awareness of the manager/owner regarding the human resource involved in the touristic activity of the company.

Each meeting consists in discussions between the facilitator and the manager/ owner based on a methodology known as “appreciative inquiry” that helps the manager/ owner of the SME to emphasize the good practice and the strengths of the employees and to build a learning system based on the specific situations from the workplace experience. Also the facilitator will help the manager to have a more reflective approach of the business and less to receive tailored solutions.

Each meeting will be followed by a period of time of reflection, planning and implementing the measures agreed by the manager with the facilitator, and, of course an evaluation of the results.

The facilitator has the opportunity to use templates but also, if necessary to adapt them, because facilitation of self-learning at workplace is not a formal process, it has to be adapted to the specific needs and vision of the manager / owner of the SME.

The process described in this guideline is based on the experience of the Partners of the project and enriched with the experience of the consultants that attended the workshops of the training activity organised in the project, the exercises provided to help the consultants to work with the managers from tourism use the international experience and also the common problems identified in the analyse of the tourism from the regions in which the Partners act.

2.2: Overview of Project and Objectives

The project “Self-Responsible Learning of Key Competences in Tourism SME- a Mean to improve Competitiveness and Employment- TouriSMEComp” was proposed for financing through a partnership formed from the following organisations:

- Foundation for Promoting the SME Brasov, Romania,
- Institute für sozialwissenschaftliche Beratung GmbH, Regensburg, Germany
- GAZI UNIVERSITESI, Ankara, Turkey,
- Associação Empresarial Viana do Castelo, Portugal,
- Supera poslovno upravljanje d.o.o., Zagreb, Croatia,
- Fundação de Ensino Profissional da Praia da Vitória, Portugal.

The aim of the project is to qualify 20 learning facilitators who will work with 50 hotel and restaurant owners and managers on providing adequate learning pathways for low skilled employees in the hotel and restaurant industry.

The project will reach out to at least 300 low skilled employees of tourism SME.

The training material for facilitators, Tourism SME owners and employees will be made accessible in an online open educational resource.

The main activities are:

- Elaboration of 5 intellectual outputs:
 - O1: Requirement Analysis Report consisting of a synthesis report with the state of the art per country and the necessary recommendations about: learning methods to improve the basic skills of managers and of workers based on approaches; requirements for profiles of managers as mentors/coaches in the learning process; profile of consultants that will work as facilitators with the managers from tourism sector.
 - O2: Training Handbook for Consultants: Facilitating Self Learning of Key Competences in Tourism SME consisting in a package of methodological guidelines and a set of modules for consultants/coaches/mentors/facilitators of training providers working with managers of the SMEs.

- O3: Training Handbook for Tourism SME Managers: Coach your Staff – Building your Employees Key Competencies by Stimulating Self-Learning consisting in a concise guideline with rationale for coaching employees – tools – example cases.
- O4: Training Material for low skilled employees to build key competences using workplace learning in Tourism SME consisting in a set of concise small units to support building key competences through workplace learning for low skilled Tourism SME employees
- O5: Curriculum for a Blended Learning Course “Self-Learning in Tourism SME” for Coaches and Trainers consisting in a course curriculum for a 5 day course to introduce to the application of the products handbook for coaches, guideline for managers and material for employees in order to qualify future coaches of the concept to apply the concept competently.
- 4 Multiplier events for presenting the deliverables elaborated during the implementation of the project and to receive feedback from the participants
- Training course with 20 consultants (facilitators) from all partners.
- Training course with 50 managers from the partner countries.
- Outreach activity in SME done by the trained consultants, consisting in developing the facilitation process of learning at workplace in the tourism SME together with the trained managers for developing the needed key competences of workers.

Expected outcomes of the project are:

- 1 report regarding the situation of workplace learning in 4 countries (Romania, Turkey, Croatia, Portugal)
- 1 handbook for consultants
- 1 handbook for managers
- 1 training material for employees
- 1 training curriculum
- website of the project
- brochures for promoting the project in 5 languages
- 20 consultants trained

- 50 managers trained

The target groups of the project are:

- Consultants that work as external learning facilitators – 20 persons
- Managers that act as internal learning facilitators – 50 persons
- Employees from tourism SME- 300 persons

2.3: Relevance of Learning for TouriSME and their Employees

From Second Choice to Second Chance: Key Competency Development for Tourism Employees: Conclusions of O1- Requirement Analysis Report

Tourism is very important for the European economy. It accounts for 5 % of direct employment and a high proportion of European GDP.

It has a tremendous multiplying effect over other economic sectors. A stable growth is forecast for the future.

Tourism has one of the highest labour mobility rates across Europe. A truly European economic sector and a labour market with a truly European dimension is currently emerging.

Thus, the discussion about new occupations and future skill needs for the sector in Europe has a particular significance.

Tourism is still a very specific sector, so specific knowledge about the sector is required.

For the workforce general and basic skills are required for everybody, along with tourism specific knowledge and also Tourism related competences, the latter being the knowledge and skills in action in the respective situation.

For example, lack of knowledge of foreign languages has been recently recognised by national tourism organisations of some European countries as a lasting problem and even as a competitive disadvantage. Entrepreneurship – a concept still vaguely defined – is more widely discussed nowadays, re-emphasizing the fact that tourism in many cases provides the opportunity to open a small business for a broad range of people. Therefore the concept today is discussed already at the compulsory school level.

There are also specific skill needs defined by labour category.

At management level, these are rather transversal skills, hence tourism managers often have an educational background in accountancy, marketing, law, economics, etc.

Nevertheless, managers are expected to possess the following skills and competences: computer skills, business and strategic planning, strategic alliances, management skills, management through visions and values, management, accounting, product development, innovation, human resource management, destination management, project management, management skills to cope with globalisation influences, change management, marketing and sales skills.

As a TouriSME, even a small, family owned one, can only work with and through its employees, human resources management, organising with whom the business will work in which way, is key to all of the other fields of expertise.

Particularly in smaller establishments, where there are no specialists or departments for human resource development, the manager or owner of the hotel or restaurant is the key person, as he/she decides what will happen. He decides who will be hired, decides the real work situation, and decides budgets of time and resources. Therefore it is the manager who decides about the learning opportunities of his employees.

The business and the competence framework of his employees is mostly his own making. Therefore it must be in his best own interest to take great care to make learning one of the main pillars of his business strategy.

In larger restaurants and particular larger hotels, other labour categories also have to be integrated into this framework: supervisors, skilled craft workforce and the semi-skilled. Supervisors in tourism need basic computer skills, human resource management, hygiene and HACCP (4), accounting, supervision and training skills. Personal skills, problem solving and basic computer skills are especially important for the skilled craft workforce.

Nowadays, further demands are placed on semi-skilled tourism staff in terms of both personal skills and specific technical knowledge (e.g. bar attendance, cleaning, catering).

The professional skills of a mid-level manager or skilled worker in tourism today are not enough and they probably never were. The ability to integrate the individual

skills and knowledge to the workers supervised, to grow new talent and to help to adapt the whole team to the customer needs and business strategy are at least as important.

The Tourism market is always changing and hotels and restaurants can only be successful if they develop a specific and unique strategy to find and fill their position in this market.

Being aware of such challenges and trying to overcome them are essential to successful training or education.

Therefore some of the criteria for successful learning in Tourism include:

- (a) Make the learning process job-related;
- (b) Where possible, apply the mentor model;
- (c) Get strong support from both management and workers;
- (d) Try to integrate learning in the career path of the employee;
- (e) Embed the learning process in a strong framework supported by the organisation or company;
- (f) Include basic skills (language, behaviour, culture and organisation) in this learning process;
- (g) The whole process needs passion, or at least motivation, with continuing stimulation from both sides;
- (h) Learning plans need to be transparent to the users;
- (i) Learning (still) needs to be fun for everybody;
- (j) It is very important to establish goals and measures to evaluate results and outcomes;
- (k) Importance of social dialogue is not to be neglected;
- (l) Partnership in general is crucial for the success of every kind of learning process.

Looking at the European Commission's work on this topic so far, we have to start by mentioning the High Level Group on Tourism and Employment. One result of their work was the creation in 1998 of five thematic working groups to boost tourism and employment.

Working group B, Improving training in order to upgrade skills in the tourism industry, came up with three relevant conclusions. The main conclusion was to attract skilled labour and support micro-enterprises in the tourism sector.

A second proposal consisted of the creation of a permanent observatory on learning, employment and labour environment of the tourism industry. This proposal has, in the end, not been retained by the European Commission although this was, and still is, seen as a very valuable idea. The development of a Handbook on learning areas for the European tourism industry was the third proposal of working group B.

In the scope of the TouriSME Comp project the partners have conducted a comprehensive research on the situation of TouriSME in their respective regions. The research included literature studies, focus group interviewing and a survey of TouriSME.

The main results from this research substantiate the claim that improving the learning opportunities in TouriSME is highly relevant and needs immediate and determined action.

The main focus of this learning, however, may come as quite a surprise.

Conclusion 1: *Main Areas of Learning for TouriSME Managers and Employees and Main Requirements for Pedagogical Approaches and Material*

While traditionally, training in Tourism mostly focused on the specific skills and knowledge in Tourism, according to the findings of the initial research the main learning needs for SME employees are covered by the eight key competencies of lifelong learning (see Ch. 2.5.3).

Those competences, which allow individuals to learn more and learn quickly on a continuing basis, according to the research are the prerequisite for the acquisition of specific skills.

Only if a person is able and willing to learn, these Tourism specific skills can be taught with a prospect of success.

Among the key competencies, competences of general attitude, communication and entrepreneurship stand out.

The research results suggest that qualification problems and gaps in TouriSME in the partner countries are not primarily related to a weak initial education or a generally low level of academic achievement.

Rather the sector suffers from a high proportion of employees (and probably also managers) for which the hospitality sector is not the “first choice”, but rather just the only available option “to make some money”.

Low motivation in general and a lack of enthusiasm to develop the necessary competences to perform on the highest level are an effect of this fundamental situation.

Since this results in a low level of productivity, low wages and a high fluctuation of staff, along with limited career opportunities a weak image of the sector as a whole follows and a downward spiral of limited expectations and limited efforts from all sides follows.

As the research revealed this perception of the sector is quite counterproductive, as there are also big opportunities in the sector in all of the partner countries.

A coordinated effort to develop the professionalism of the sector to the highest international standards can help to use these opportunities.

Career opportunities must be made a reality, be it career pathways within the regional sector, be it in the encouragement of entrepreneurship. Excessive individualism must be overcome and collective skill formation for the sector must become the norm.

The learning program within the TouriSME project, of which the guideline at hand is the first module, a handbook for managers the second and supporting material for employees the third therefore focus on:

- Motivation and sense-making: discovery of the tourism sector as an attractive and worthwhile sector of employment and an attractive career opportunity
- Development of individual competence profiles matching the tourism sector:
 - Pro-active attitude,
 - Positive thinking,
 - Good communication skills with people from different backgrounds,
 - Sense of pride and ownership of one's own work,
 - Service mentality,
 - Problem solving and situational flexibility,
 - Long term commitment and systematic skills development.

In this sense, the aim of the learning must focus on the key competence no. 7 "Sense of initiative and entrepreneurship".

The material presented here as well as the consultancy delivered and the guidance by managers should emphasize, that work in tourism can be a pathway into a sustainable career, that work in tourism must not be one with a bad image, but one that is respected because of the quality of the services delivered. In times when chefs are celebrated stars of international TV shows this argument should be easy to make.

To evoke and reinforce this perception and self-understanding is the main task for the supporters of such learning, the consultants as facilitators of self-learning of the TouriSME.

We imply that given the situation described, the learning of individual skills will in many cases not be the first priority and the start of the process. Rather the discussion of a positive vision and of common and individual projects for the advancement of identification with the sector and the vision of individual career pathways must precede more detailed and technical skill development.

As a result of prior studies and projects a more reflective and systematic way of working and constant improvement of work processes can effectuate an improvement of multiple factors, as concrete professional skills, as e.g. cooking techniques, room making, serving etc., through the systematic discussion of the work processes in the respective areas, the identification of quality gaps or quality standards to achieve or other aims for learning.

The discussion of learning pathways for achieving such learning goals will enhance the awareness for learning opportunities available at the workplace as well as the awareness for additional learning arrangements that might be needed.

In all cases a pro-active attitude and targeted communication will be needed to arrange such learning.

This insight guides the methodological choices made in this programme, which relies on co-creation and a high level of interactivity.

The soft skills and/or meta-competences, which have been identified as the most pressing learning needs can be improved more effectively, if they become a topic of reflection.

Therefore elements of the methodology of “appreciative inquiry” have been chosen as the guiding principle for the consultancy process.

Consultants/facilitators should encourage reflection and learning by rather by asking questions than by “teaching” content.

Therefore, among questions to be reflected could be

- In which way have I demonstrated a pro-active attitude in this XY work process?
- In which way have I been aware of the needs of my customer and what have I done to identify these needs?
- What have I done to communicate my enthusiasm to the customer?
- How can we work together to best meet the customers’ needs?
- What arrangements of work planning do we need to identify problem areas and solve problems identified?

- What are my individual goals and visions? What do I want to be able to do in 5 years?
- What do I need to do to achieve this?
- What will be my first step?

As in fact the manager is in charge of shaping the working as well as learning environment, of making the strategic decisions and of determining the individual job profiles, tasks, duties and areas of self-responsibilities, as well as the “hard fact” of hours, payment and promotions, the approach and material must put the manager at the centre of the process.

The consultants/facilitators therefore will work mainly with the managers, whereas the managers will work with their employees.

Learning cannot be delegated. A working learning arrangement, particularly in small and medium sized TouriSME must be highly individual and “tailor made”.

The business is to a high degree a creation of its owner, developed according to his/her insights, preferences and experiences.

Only this way the business can make a unique selling proposition to its customers.

Consulting TouriSME therefore has the task to help the managers to develop such unique vision and arrangements in contrast to prescribing a standard solution.

2.4 The Opportunities of Workplace Learning

2.4.1 Workplace learning – the adequate method of learning in tourism SME

It is a common trend in European enterprises of all sectors to bring continuing training closer to the workplace and to integrate learning and work.¹

Although initial training mostly takes place in schools, for the Tourism sector this integration of learning and working is not new, but the spontaneous mutual exchange of knowledge and experience is the main form of learning, if a highly unsystematic and arbitrary one in many cases.

For company practitioners, the decisive argument in favour of learning of this kind is its cost and the elimination of “learning-transfer” problems.

The latter is a characteristic problem for many cases of external training, as often

- curricula are not adequately matched with the real needs of individual hotels and restaurants,
- opportunities to practice learned content are not organised and also if there is
- Too much time between learning and application of the learned.

Integration of working and learning however has consequences for the organisation of continuing training and for the personnel concerned.

Management and owners of hotels and restaurants become instructionally active and transfer of knowledge, skills and experiences to co-workers becomes part of the professional profile of every employee in a Tourism business.

According to the results of the initial research in TouriSME, disengagement from the work in Tourism and an underutilisation of the knowledge and intelligence of the

¹ Cf.: Krauss, Alexander: HOTSME – Final Evaluation Report, Regensburg 2007, p. 73 ff.

workers is a main cause of frustration among employees and owners of TouriSME alike.

In a state of the art training culture, where employees are not disengaged and working only "for the money", and therefore have to be controlled and supervised closely it will not be beneficial to confront employees with training programmes designed for him out of abstract considerations or the needs of training providers.

If the employee can strongly influence the "when, where, what and how" of competency development a higher level of engagement can be achieved.

After all, potentially an employee who can be presumed intelligent is better placed than anyone else to determine training needs in various fields of activity, to pronounce as to the direct usefulness of training given to him for coping with his work in practice, to relate his practical usefulness back to the learning situation (curriculum, instructors, materials) and to identify skill shortcomings that still exist and initiate new learning processes.

The arguments for managers to allow and foster self-organised learning in the workplace can be summarised into the following main arguments.

- Reactive continuing learning is always late, because the speed of changes in the environment of hotels and restaurants is ever increasing. It is unrealistic to expect that the qualification and skills gaps resulting from these changes can be filled by external training measures alone, particularly due to limitations in monetary and time resources, but also because of the problems of adequately transferring the learned content to the actual work situation.

Therefore the ability to learn in the work situation in order to adapt to changes and challenges must be the cornerstone of any learning strategy.

- Structured learning in courses has its place, but its main target must be to increase the ability to learn also on the workplace, outside of formal training arrangements.

The ability to reflect the work processes is a key ability in this context.

- Self-organised learning is the only way in which organisations that are limited in resources (time, funds) can implement a broad based learning strategy. This is especially true for very small establishments that find it often very hard to delegate employees to external training measures. Although an increase in the investment in formal training measures is also necessary and strongly desirable, the volume of learning opportunities on the workplace is much higher.
- Efforts to organise learning on the workplace are the prerequisite of the utilisation of skills acquired in formal learning arrangements.
- Individual learning, group/team learning must be mutual reinforcing. Concepts of self-learning must not be misunderstood as concepts that put the responsibility for any necessary learning on the individual alone.
- Individual learning will be productive only if it is part of an organisational learning strategy.
- Organisational strategies can only be successful if individuals in the organisation are able and willing to learn. It is therefore necessary to develop training methodologies that support the development of such individual learning abilities.
- Self-organised learning depends on a certain culture of mutual trust within organisations. Employees must feel free to talk about own deficiencies and deficiencies in the organisation without fear.

A key part of self-learning is self-reflection of work processes and individual work practices.

A key result of this reflection can be the identification of learning needs. The identification of learning needs by the employees as experts of their own work situation are often much more precise and efficient than a steering of the training process by the offers of training providers.

Self-learning can help in this process, but the process of knowledge transfer is always dependent on the ability and willingness of employees to participate in this process.

The organisation of innovative dialogues that include partners from different functions and hierarchical positions in the organisation proved to be useful in this context. These innovative dialogues can be encouraged especially by owners and managers that are willing to question also their own routines and approaches.

Ability to learn is an important part of the employability of individuals. This is true for the continuing value of the employee for the employer, but also for the ability of the individual to recognize the needs of employing organisations, relate them to reflected individual abilities and qualifications and to organize their working biographies. Therefore the framework of the eight key competencies for lifelong learning can be the adequate conceptual framework for learning in the workplace. All learning opportunities should always be evaluated also with regard to what contribution they will make to the development of one or more of these competencies.

According to the experiences of partner AEVC, training in a working context, in which the learning activity is developed at the actual work place, or if appropriate and feasible in a similar environment (simulation and training) allows for a positive intervention in enterprise competitive edges, once properly suited in the company's problem solving methodology, arbitrated and facilitated by the enterprise's management and by the training institution and addressed to the needs of individual learning.

Practical Training in a Working Context is performed by operating professional activities framed in structured training paths and under the supervision of a Tutor (facilitator), infused in real work processes. PTWC targets goals hardly reached in other ways of organizing training, namely:

- *Technical and technological enrichment*

Training in working context allows contact with technologies and techniques specific to the job or function held, possibility that is inexistent in other ways of organizing training, including simulated practical training.

- *Practical knowledge use*

Training in working context is an opportunity to bring into play the acquired knowledge and use it in specific working tasks or under supervision and, by this reason, it potentiates a positive learning impact in the development of professional skills.

- *Attaining transversal skills*

Training in working context promotes the development of working habits, of entrepreneurship, of professional responsibility sense and of human relationships at work.

- *Organizational performance*

Training in working context supports the real experience of corporate work, a highly important asset for an easier adjustment of the trainee to the job market.

2.4.2 Theoretical background: Constructivist Theories of Learning

To add to these practical arguments for self-learning and self-reflection the scientific discussion elaborated numerous arguments for the claim that these are not only artificial methodologies, but correspond closely to a general human characteristic that is constitutive of an adequate understanding of learning itself.

Self-learning and self-reflection are closely related. The most general definition of self-learning underlines this close relation of self-learning, self-reflection and self-evaluation:

"In its broadest meaning, >self-directed learning< describes a process in which individuals take the initiative, with or without the help of others, in diagnosing their training needs, formulating learning goals, identifying human and material resources for learning, choosing and implementing appropriate learning strategies, and evaluating learning outcomes"²

As theoretical background for the theory of self-directed learning most often reference is made to constructivist theories of psychology. Candy therefore writes that "one of the central tenets of constructivism is that the individuals try to give meaning to, or construe, the perplexing maelstrom of events and ideas in which they find themselves caught up."³

That means, in contrast to positivist theories, learners do not simply integrate objective knowledge. Much to the contrary, in constructivist perspective learning is a process in which individuals reorganise and restructure their own experiences. This way the theoretical shift from an emphasis on teaching to an emphasis on learning is prepared. Constructivism "leads directly to the proposition that knowledge cannot be taught, but only learned (that is constructed) because knowledge is something built up by the learner."⁴

Self-reflection is the cornerstone of self-learning abilities. Dewey claimed as early as 1933 that is nothing but the "active, persistent and careful consideration of any belief or supposed form of knowledge in the light of the grounds that support it and the further conclusions to which it tends."⁵

Schön introduces reflection as the elementary component of professional knowledge and practice. He differentiates reflection about professional activities, reflection within

² Knowles, Malcom: Self Directed Learning... New York 1975, S. 18

³ Candy, Philip C.: Self-direction for lifelong Learning. San Francisco 1991, p. 254

⁴ Candy, Philip C.: Self-direction for lifelong Learning. San Francisco 1991, p. 270

⁵ Dewey, John: How we think. A restatement of the relation of reflective thinking to the educative process, Boston 1933

professional activities and underlines the relevance of reflection about present and former professional activities.⁶

Boyd and Fales define reflection as

"the process of creating and clarifying the meaning of experience (present or past) in terms of self (self in relation to the self and self in relation to the world). The outcome of the process is a changed conceptual perspective..."⁷

Boud, Keogh and Walker developed a model of reflection with three key factors: consideration of experiences, awareness of the emotions connected with these experiences and the re-evaluation of experiences.⁸

Brody defines reflection as the effort to "impose order and coherence on a stream of experience and to work out the meaning of incidents and events."⁹

Saban, Killion and Green differentiate three kinds of reflective thinking: "reflection in action", "reflection on action" and "reflection for action". They analyse that the third kind of reflection results from the first two of them. "We adjust our behaviour based on our increased knowledge base and a more informed perspective".¹⁰

In spite of different foci in the different definitions all authors of the quoted definitions agree that reflection includes an always repeated thinking about experiences with result of revised perspectives and improved practices. However, only the cognitive aspects of reflection have been highlighted by the definitions quoted. There is also

⁶ Schön, Donald A. : Educating the reflective practitioner. Toward a new design for teaching and learning in the professions. San Francisco 1987

⁷ Boyd, Evelyn, Fales, Ann W.: Reflective Learning. Key to learning from experience. In: Journal of Humanistic Psychology 23(1983), 2 p. 101

⁸ Boud, David, Keogh, Rosemary, Walker, David: Promoting reflection in learning: A model. 1985

⁹ Brody, Celeste: Using Co-teaching to Promote Reflective Practice: Journal of Staff Development 15 (1994) 3, p. 33

¹⁰ Saban, Joseph M, Killion, Joellen P., Green Catherine G.: The centric reflection model: A kaleidoscope for staff developers. In: Journal of Staff Development 15 (1994)3, p.17

another important side to professionally relevant reflection. This is the social aspect, the aspect of reflective dialogue.

Following the increasing consensus on constructivism as a leading paradigm of discussion of human learning, the aspect of social communication as the cornerstone of reflexive processes was highlighted ever more.

Hatton and Smith introduce the term of “dialogical reflection” to describe reflective processes which comprise thinking, self-distance and the search for reasons. Especially such dialogues are reflexive, that are tentative, explorative and sometimes not yet well defined.¹¹ Isaacs uses the term of reflexive dialogue to describe a process “where you become willing to think about the rules underlying what you do-the reasons for your thoughts and actions.” He claims that “reflective dialogue can give rise to generative dialogue, in which we begin to create entirely new possibilities and create new levels of interaction.”¹²

Mezirow uses the term of “reflexive dialogue” referring to “that specialized use of dialogue devoted to searching for a common understanding and assessment of the justification of an interpretation or belief. This involves assessing reasons advanced by weighing the supportive evidence and arrangements and by examining alternative perspectives. Reflective discourse involves a critical assessment of assumptions. It leads toward a clearer understanding by tapping collective experience at a tentative best judgement.”¹³

In Germany the discussion on self-reflection has used the term of “self-evaluation” in a quite similar sense. The pedagogic theory of the regulation of activities by Hacker,

¹¹ Hatton, Neville, Smith, David: Reflection in Teacher Education. In: Teaching & Teacher Education 11(1995) 1

¹² Isaacs, William: Dialogue and the Art of Thinking together. New York 1999, p.38

¹³ Mezirow, Jack et al: Learning as Transformation: Critical perspectives on a theory in progress. San Francisco 2000, p. 10f.

Skell and Volpert¹⁴ as well as the application of this theory in teaching facilitation and consulting look at reflection and self-evaluation as a natural part in the model of the complete sequence of action. Reflection in this perspective is a natural part of human activity. Thinking/planning, acting and reflecting are the steps in the natural sequence of activities and reflection is the driver of any improvement of practices.

A last aspect in this context is the close relationship of self-evaluation and the feedback offered by others. The utilisation of the information provided by others on the individual activities helps to overcome blind spots, increase the awareness of the consequences and appearance of an individual's activities on others and therefore completes the picture an individual holds of itself. Therefore it seems to be very desirable to develop a culture of sensitive communication that allows for the exchange of feedback among the dialogue partners.

A short conclusion from this "tour de horizon" of the literature on self-reflection seems in place.

Firstly reflection and self-reflection are competences that are critical for the further development of professional abilities. They are competences that must and can themselves be developed and learned.

Secondly self-reflection is a practical methodology of assurance of the quality of learning processes in organisations. It is based on the integration of aims, motivation and critical self-distance within an individual.

How can this process be supported, namely what kind of approach towards individuals and organisations seems to be appropriate as a means to expose them to these scientific insights in a non-directive, practical and explicitly non-scientific manner?

¹⁴ Hacker, W.: Allgemeine Arbeitspsychologie. Bern 1998, Volpert, W.: Handlungsregulationstheorie, Bonn 1993, Hacker, W., Skell, W.: Lernen in der Arbeit, Bonn 1993

The methodology of appreciative inquiry (see Ch. 2.5.4) can help to implement such insights.

The overview below also might help to understand the underlying rationale of the step by step programme used in the TouriSME project, which aims at inspiring reflective dialogues within the management team first and then, as a consequence of the new role of the management team as the main facilitators of learning in TouriSME, of reflective dialogues involving all of an hotel or restaurants employees.

	Traditional Learning	Learner Led Competency Development in the Work Situation
Controlled by	Trainer	Learner
“Energy Flow”	Trainer to learner	Interactive, negotiated
Role of trainer	Impart knowledge, skills	Facilitator, advisor, monitor
Role of trainee	Passive consumption	Active production
Adaptiveness	Rigid, pre-planned, pre-conceived	Flexible, responding to needs
Time-frame	Sporadic, fixed	Continuous, using learning opportunities, addressing learning needs in real time

2.4.3 Facilitated, systematic Learning in the Workplace – an Opportunity to Acquire Key Competencies for Life Long Learning

The arguments developed above are backed up by the research in the context of TouriSME.

Considering the structure of TouriSME, of which very few are large and most are of micro size, a resource efficient, flexible and responsive form of learning is a must.

Large shares of Tourism companies identify as main gaps of competence exactly those, which can be improved by interactive forms of learning, namely:

- Team work and management of work relationships;
- Flexibility and adaptability towards professional situations and technological evolution;
- Receptivity to lifelong learning (availability, motivation and learning context);
- Interaction with clients in an individualized manner, responding to demands and to growing multiculturalism;
- Integration of commercial/promotion/sales component in interaction with clients, controlling costs and optimizing results;

Therefore workplace learning can be considered as the most appropriate method, because it allows training/learning without interrupting productivity or without harming the quality of the service, since, in most cases, it is impossible for the worker to be absent for training.

Essential competences for lifelong learning, as defined by the European Commission, are (see Ch. 2.5.3):

- Communication in native language;
- Communication in foreign languages;
- Math skills and basic skills in science and technology;
- Digital skills;
- learning to learn;
- Social and civic skills;
- Initiative and corporate spirit;
- Cultural sensibility and expression.

These competences result from a combination of knowledge, aptitudes and attitudes adequate to the context.

They are particularly necessary to personal fulfilment and development, social inclusion, active citizenship and employment and they offer added value to the job market, presenting flexibility and adaptability, satisfaction and motivation.

As for all persons in full time employment, their work represents the biggest share of time spent, of social contacts made and maintained and learning in the working context has a crucial importance in the process of acquisition and development of these skills, particularly in adults.

It is mostly in the context of their work, where employees have to tackle new challenges, cope with problems, are exposed to new trends and technologies and need to interact with customers and clients.

All these interactions are potentially opportunities for learning.

In fact there is a high amount of “spontaneous learning” going on in TouriSME, but in fact everywhere in practical life. There exists an enormous capability and willingness of people to cope with unexpected situations and to acquire the means to do so. Experts agree that most of the learning within companies happens informally, i.e. not planned, not organised, and mostly happening without even being noticed or supported consciously.

As an example a good waiter will become aware of changes in the style and expectations of customers without being taught, merely by conversation and observation. He will change his ways of acting spontaneously and adapt.

However, while informal and spontaneous processes are indispensable in each company as well as in daily life, there are many examples of failure.

Developments and changes are disregarded, no consequences being drawn from new constellations. Problems are known, but not talked about, etc. A number of such barriers to learning are discussed in Ch. 2.11.

No enterprise therefore should simply rely on spontaneous learning and hope for the best, i.e. that all employees learn spontaneously and react adequately to challenges and changes.

Many challenges cannot be mastered this way. Therefore making the learning more accessible and visible is key for companies.

For individuals they can only use their ability to learn spontaneously for a systematic competence development if they “know what they are doing”.

Only if the individual is able to be aware of what it has just learned, which competences he or she has developed by mastering a challenge, informal learning is a contribution to the individual's portfolio of competences.

Only if the individual is able and is in a context where it can reflect his learning and state of competences, these competences can be communicated. Only if they can be communicated they can become an opportunity to further build the individual's career.

Only if there is an overview of the current state of the competencies of each individual, but also about the opportunities the work-situation provides to develop specific opportunities, productive challenges can be posed in a targeted way.

For example, knowledge about calculating can be practiced by calculating a dinner for a group. If they are not practiced they will be forgotten.

For a “shy” employee, the creation of a context where he can learn to speak up more freely can be helpful. If a mentor accompanies him in communication more with customers, this can be an additional step forward etc.

The work environment provides an abundance of such learning opportunities. They must be reflected for their value regarding competency building and must be used as a learning opportunity on a continuing basis. Then they can be a first rate, if not the only efficient way to build an individual's key competencies for Life Long Learning.

Therefore, while spontaneous learning remains important, a "third way", between flexible but unsystematic spontaneous informal learning and strictly organised, often inflexible and rigid formal training must be found.

This third way is systematic, facilitated, self-directed and self-organised workplace learning.

2.4.4 Emotional Labour and Labour Productivity in Tourism

Emotional Labor and Emotional Display Rules in Hospitality Industry

Emotions are a complex frame because of the humans and their behavior. So, it must be handled to understand employee in organizations. In this context, human behaviors and emotions are very specific topic for competitive advantage and customer satisfaction in service industry. Also, in hospitality industry, employees are required to manage their personal emotions to produce desired customer responses.

Arlie Hochschild (1983), in her seminal work, *The Managed Heart* wrote: Commercialization of Human Feeling defines this phenomenon as emotional labor. Emotional labor is what employees perform when they are required to feel, or at least project the appearance of, certain emotions as they engage in job-relevant interactions (Kruml & Geddes, 2000).

Hochschild (1983) conceptualized emotional labor based on a service acting paradigm, which suggests service is a “show” where the service employee is the “actor,” the customer is the “audience,” and the work setting is the stage. The work place, such as a restaurant, provides the setting and context that allows actors, i.e., wait staff, to perform for audiences, the diners. The interaction between actors and audiences is based on their mutually understood definition of the setting, specified as occupational or organizational norms or display rules (Chu & Murrmann, 2006).

Emotional labor, originally developed to describe the relationship and almost all occupational groups in the service sector can be seen in the behavior of emotional labor. For example, the smile of cabin crew, the market with cheerful employees, be willing to chat hairdressers, doctors being cold-blooded and execution, offering harsh attitudes, demonstrate the requirements of service of employees of people are

emotional labor behavior that they feel is necessary to ensure customer satisfaction and productivity (Robbins & Langton, 2005).

If that employees interact with customers during service delivery, leads to acting emotional labor in addition to the physical effort. Therefore, labor-intensive character of tourism and being extremely important to ensure customer satisfaction, demonstrates the importance of managing emotions in the tourism industry.

There are three acting of emotional labor: *surface acting*, *deep acting*, and *genuine acting* (Ashforth & Humphrey, 1993; Hochschild, 1983).

In *surface acting*, employees simulate emotions that are not actually felt, by changing their outward appearance (i.e., facial expression, gestures, or voice tone) when showing required emotions.

Deep acting occurs when employees change not only their physical expressions, but also their inner feelings by using imagination or recalling past cheerful experiences to generate appropriate positive emotions.

Finally, employees are engaged in *genuine acting* when their felt emotions are congruent with expressed emotion and display rules. For example, a bartender may show genuine caring when trying to comfort a depressed customer (Chu & Murrmann, 2006).

In today's competitive work environment, management has begun to focus more on how interpersonal interactions impact organizational success. How employees speak and act toward others (e.g., customers, teammates, patients) can affect important outcome variables (e.g., sales, quality of team decisions, patient satisfaction) that, in turn, influence the bottom-line of the company (Diefendorff & Richard, 2003).

In most theories of emotional labor, organizations specify display rules that serve as standards for the appropriate expression of emotions. Emotional labor entails following these display rules regardless of how one actually feels. For example, the display rules for the typical customer service employee involve expressing positive emotions, such as cheerfulness, and avoiding the expression of negative emotions, such as contempt. When the person is in a positive mood, these display requirements may be met by expressing naturally felt emotions. However, if the person is in a negative mood, he/she may have to use emotion regulation strategies to achieve the desired display (Diefendorff & Gosserand, 2003).

Employees must manage their reactions through either surface or deep acting so that they can adhere to organizational rules about emotional displays. When emotional display rules are inconsistent with or even contrary to the employee's feelings, he or she must modify outward emotional displays, often by suppressing his or her own emotions (e.g., anxiety, unhappiness, tiredness, anger, hopelessness) and "faking" the required expression (e.g., cheerfulness) (Lam ve Chen, 2012).

The service industry in general, and the hospitality industry in particular, implement display rules to regulate employees' behavior. "Show an upbeat attitude at every table" or "Put energy and enthusiasm into every guest interaction" are common instructions in employee handbooks. In addition, companies use policies, symbols, myths, and stories to teach, demonstrate, and reinforce these display rules. Based on these display rules, service providers are expected to act friendly and upbeat and to disguise anger and disgust, even toward annoying customers (Chu, 2002).

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Productivity in Tourism- Argument for convincing the managers of the value of workplace learning

Productivity means the value of goods or services produced for unit of human or capital resources involved.

True competitiveness is measured by productivity, which depends of the efficiency of the resources involved.

Efficiency means to compare the effects (turnover, profit) with the effort involved (human resources, capital investment)

Labor productivity in services means how efficient is used the human resource to produce the services.

The labor productivity can be calculated as follows:

$$W = (\text{Turnover} / \text{Number of employees}) * 100$$

The tourism sector includes food and beverage, accommodation and transport firms, which are often made up of small businesses. The employees are usually payed with lower wages in comparison with other services and sometimes they have low skilled jobs. Even so, companies from tourism register high staff turnover. Also the recreation business can be added to this sector.

Being a lower productivity industry (in comparison with other services) do not mean tourism is not competitive or profitable. However, applying measures that contributes to raising productivity will make businesses more competitive and as a consequence the profit raises and the wages can be raised. Tourism businesses often represent a lifestyle choice, the owners sometimes used to work in the industry on different jobs

before starting up. It is well known that in tourism the owners work extremely hard and they also can benefit from initiatives that improve labor productivity.

Due to the fact that in tourism the employee has direct contact with the customer and the satisfied customer will leave good comments on the specialized sites (that will encourage more tourists to come), the way and the level of the involvement of the worker for generating pleasant experience for the tourists contributes directly to the turnover of the company.

Increasing competition in the tourism industry is a must for this economical sector. Higher competition will determine the improvement in quality and service standards and, of course in delivering better value for money. From these benefits will profit the consumers as well as the companies involved in tourism and more tourists will be attracted. Also, to attract more international visitors, every manager and owner have to think how the company is distinctive in the eyes of discerning tourists who have the choice of many tourist destinations.

Tourism managers can profit from the new technologies monitoring the specialized sites as TripAdvisor or Booking on which they are listed and monitoring the customer's comments. They can use the feedback comments to improve the productivity of labor by finding which procedure was not followed and which key competence should be developed with their employees.

One of the key drivers that generates increase of labor productivity are related to the level of skills and competences of the human resource.

The factors that can influence the labour productivity in tourism are:

- the employees professional status
- the motivation for working in tourism
- the attitude regarding the customers
- the work experience of the employees

- the work procedures and standards used in the company and the extent of following them
- the motivational system used in the company
- the workplace learning system agreed and followed in the company
- the general attitude regarding the work in tourism.

The measures that managers and owners can use to increase the labour productivity are related to the professional training of the employees, regarding the change of attitude and the level of involvement. The custom to salute the tourists in their mother tongue and to smile do not need expensive training courses but can produce great changes in labour productivity.

The managers should be aware that they have to be constantly mindful to the quality increase of the touristic services provided. The human resources that managers work with should be regarded as the main factor that contributes to the development of the business not only as generating expenditure.

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2.5: Key Concepts used

2.5.1: Facilitation of Learning

“IF YOU TELL ME IT IS POSSIBLE TO FORGET, IF YOU SHOW ME I WILL REMEMBER, BUT IF YOU INVOLVE ME I WILL UNDERSTAND”

WORKPLACE LEARNING could be defined as an approach that enables workplace transformation in order to be the “driver of learning and development”.

As discussed in Ch. 2.4.1 workplace learning brings a lot of benefits for managers as well as for employees, among them:

- contributes to employees motivation and loyalty
- allows the valorisation of creative potential of employees in order to increase work productivity, by stimulating the employees in identifying solutions for work issues and to assume responsibility for it; also stimulates the interest for updating their knowledge and for continuous improvement of professional competencies
- contributes to the harmonization of employers needs to employees skills
- develops a range of aptitudes in order to increase work efficiency and company competitiveness, by considering clients’ needs for improving product/service quality

FACILITATION OF WORKPLACE LEARNING could be defined as *a process aiming to create a learning environment that empowers the learner.*

The *facilitator* is a professional who works with learners in order to help them to transform themselves as individuals / team members/ organizational employees.

A facilitator of learning could be a peer, mentor, supervisor or manager and learning facilitation could be developed through relationships such as peers, social networking, communities of practice or management.

The role of the facilitator is to create and maintain an environment conducive to learning, facilitate transfer of the skills to on-the-job use, reinforce the skill use, encourage active participation of trainees and keep them focused on the activities.

The characteristics of an effective facilitator of learning include:

- Encourages interactive approaches to learning activities,
- Establishes and effectively communicates relevant and achievable goals and tasks, gives feedback and uses transparent evaluation criteria,
- Acknowledges learners as “co-producers” of new knowledge and skills,
- Recognises prior life experience and knowledge as valuable foundation for learning,
- Values the social interactions involved with learning in groups,
- Adapts the facilitation to the context in which the learning occurs, uses flexible teaching approaches that address different learning orientations.

Mutual cooperation between facilitator and trainee is essential; the person supported must be open – minded, engaged and motivated to act for own development.

The best facilitator is a coach, mentor and consultant in one person.

The **coach** is a trainer whose task is to motivate coachee (trainee) to reach expected objectives. Coach acts as a partner for the coachee, helping him to define objectives and giving useful tools for reaching it; he leads the coachee to find own solutions within the process of personal and vocational changes.

COACHING stages include:

- working process analysis, focusing on evaluation of actual level of competences and skills of trainees; diagnosis of existing trainee's skills shortcomings and shortages
- defining desirable level of skills and competences of trainee
- Trainee's development plan – schedule of achieving/improving skills, considering the existing constraints (such as working programme, technical etc.)
- identification of influences methods to be applied
- training
- evaluation of progress made
- conclusions and feedback from trainee – what went good, what could be done better, what mistakes were made, overall conclusions

The manager as a coach is an ally for employee in helping her/him to become the person she/he wants to become, as well as obtaining vocational functional level.

In case of **MENTORING** the aim is the same, to develop competences/ skills of trainee, by sharing the knowledge, experience, abilities.

The mentoring relation is a collaboration relation, in which the mentor and the trainees have an active role, working together for professional and personal development. The relation is also oriented to targets and results and must be based on trust, respect and mutual consideration.

In case of managers who facilitate learning, by applying different tools and techniques, the manager aims to increase the productivity of employees and to create a stimulating and motivating atmosphere at the working place.

As regarding the **CONSULTANT**, his role is to find solutions for solving the problems of the companies. In this way, the consultants are professionals who are advising managers regarding the ways of action in order to improve the competitiveness of the company.

The problems of the companies could include: unsatisfied clients, wrong management decisions, lack of resources (e.g. financial, human), lack of specific information, inadequate promotion, bad time management etc. Those problems could be transformed into business opportunities with the support of a consultant.

The advice of the consultant targets the following:

- providing relevant information for solving the problem
- establishing contacts and business relations
- diagnosis and recommendations for improving existing situation
- planning and monitoring organizational changes
- training of the management and personnel

Most important for consultancy is the confidentiality and to maintain the trust of the client.

PRACTICAL WAYS FOR FACILITATING LEARNING

The ability to generate and facilitate discussions is important for optimizing learning opportunities.

During discussions knowledge and different perspectives can be analysed and evaluated in a collaborative way, providing new opportunities for reflection and learning.

In order to facilitate discussions there are some practical ways to be taken into consideration:

- Ask open questions that promote deep and continuous discussion; key or focus questions; use well-structured questions
- Be clear about what you want to achieve from the learning
- Use active listening and non-verbal encouragement
- Manage challenging groups dynamics in order to maximize participation and contribution of each group member to the discussion

- Create a positive learning environment by acknowledging/rewarding responses (thank the group members for their participation and good ideas, smile, look expectant etc.)
- Summarize and reflect on the main points discussed; give the opportunity to the participants to comment on it

Also, for facilitating learning process it must be take into consideration the following aspects:

- Maintain a supporting atmosphere
- Use different techniques and toggle it
- Give tasks and establish deadlines
- Stimulate trainees to participate to discussions and to express own opinions; encourage contributions from participants
- Make periodical assessment of the learning progress and analyse the conclusions with the trainees

A good facilitator must remember that the participants are more important than the subject of discussion; that's why he/she must be attentive to the signals from the participants and to understand their needs.

There are

ASPECTS TO AVOID IN FACILITATION PROCESS:

- offer too many details
- excessive speech from facilitators (instead of active listening)
- forcing the trainees to participate to discussions
- contradictory discussions related to interpretation of different situations
- inappropriate comments related to sensitive issues
- use of psychological games
- repeating an activity until it goes well
- repletion with irrelevant information
- over analysis of discussed issues
- letting the participants to solve themselves the issues exposed to group

- not following the practical application of issues discussed

2.5.2 Consultant/Facilitator

Conclusion 2: Profile of Consultants Implementing the Learning Methodology

Reflections on Methodology of Consulting and Consultant´s Profile from Research

Based on the findings of the research summarised in this report, some experiences from prior projects seem relevant also for TouriSME Comp. Among them is the general approach to work for the target group of employees through working with and developing the responsible manager. This set up takes account of the fact that the general strategy of the company and in company learning should be a part of his general strategy of the TouriSME and not an add-on isolated activity. This integration is the responsibility of the decision maker in the company. This does not mean that employees will be excluded from the process. Quite to the contrary managers will be guided towards including employee's views and visions for learning activities and strategies as much as possible.

Nevertheless prior projects as well as the core importance of managers that has been revealed through the TouriSME Comp research, suggest that owners and managers themselves must take the responsibility for competency development.

Competencies are a core asset of any company and therefore should never be viewed as an external concept introduced to the company by consulting an isolated group of employees who cannot make decisions. This would contradict competency development as a strategic activity.

Therefore the roles are:

Consultant: Coaches a pilot group of owners/managers in strategy building and implementation, **facilitating** the process.

Management team pilot group: Takes responsibility for the process (process owner), builds strategy, discusses and implements strategy with employees, facilitates learning process of employees, coaches employees

Employees: Work with decision makers in planning, implementing and evaluating learning activities, builds competencies for lifelong learning

Requirements for Consultants

The concepts to be developed in TouriSME Comp are intended for consultants from organisations, which are active in training and consulting SME. These can be consultancies, business associations or universities. To be able to facilitate the concept the consultants as individuals and/or the organisations as a backup should meet a couple of criteria:

They should

- have at least a basic knowledge about the concept of workplace learning and the basics of the discussion of the concept (pros and cons);
- be aware of the peculiarities of small and micro businesses including a knowledge of their day to day business style and resources;
- be aware of possible obstacles but also specific opportunities for workplace and informal learning stemming from the business style of SME;
- have some credibility among Tourism SME either as representatives of business associations or from successful previous cooperation;
- be able to communicate with SME in the language of SME (owners and managers);
- be aware of the business case for competency development, including some real life examples that will be convincing for the specific Tourism SME;

- appreciate the most simple and inexpensive measures that provide the best cost-effect ratio for the company;
- ideally already be involved in interaction with the business, so that the issue of key competency development can be raised as a solution to real world problems;
- have an overview of other learning resources apart from this concept, specifically regional and sectorial resources;
- be able to accompany the SME flexibly regarding time and place;
- Be aware of the concept of business and regional networking and willing to encourage networking on the issue of key competency development. Mutual support is one of the most powerful resources of SME;
- be open to the individual motivation of SME owners and managers for key competency development.

Last but not least they should be no tool or concept “freaks”, who put their concepts and approaches in the centre of interaction. Concepts are like streetlights. They light the way, but only drunks cling to them.

Among the behavioural requirements to be highlighted the ability to „trust the process“ is notable. Judgement on effects should be suspended until the end of the process. This trust in the process seems especially important in face of prejudices against seemingly complex tools and methodologies.

As already mentioned it is also very important to be able to act in a flexible manner in applying the tools. The use of the different steps should be adapted to the specific needs of the companies, making obvious that also seemingly complex process and instruments are a sequence of in fact very easy to handle single steps.

Interrelated with this is the patience of the consultant in dealing with the impatience of managers that is an inhibition to systematic processes and forward planning. Flexible but persistent facilitation of the process can establish more systematic working methods.

The consultant should on the other hand be also open to new ideas from the companies, and be ready to integrate them into the process. This is the only way that

allows the instrument to be really accepted and the power of the tool integrated with the innovative ideas as well as well-founded traditions of the respective businesses. Using this approach new experiences will be made and practices developed that can be useful in other settings also.

In this context, the listening skills of the consultant are important. Without the ability to understand problems and their causes and be open to solutions by really listening to the client, the process will only lead to mediocre status quo solutions.

Don't overuse instruments! A good consultant knows where to stop. This warning is directed at „tool enthusiasts“, who are often eager to employ the technically perfect tool in a way inappropriate in the specific situation. The tool that is force-fit gets a bad name because it doesn't add value.

Different perspectives of clients should be valued, not simply tolerated, since in the end the client is the owner of the process. The art of counselling clients however is, that nevertheless the consultant must care that the focus is on results and solutions. Aimless „learning exercises“ are simply not tolerated by TouriSMEs that are mostly short on resources.

The partners of the TouriSME project have discussed the aspects listed above and as a consequence defined the criteria to follow as selection criteria for consultants in the project:

Candidates should

- WANT to be a consultant and develop consultancy skills – see benefit for him/herself
- know English to be able to participate in Learning Experience
- have at least a basic knowledge about the concept of workplace learning and the basics of the discussion of the concept (pros and cons);
- be aware of the peculiarities of small and micro businesses including a knowledge of their day to day business style and resources;

- be aware of possible obstacles but also specific opportunities for workplace and informal learning stemming from the business style of SME;
- have some credibility among Tourism SME either as representatives of business associations or from successful previous cooperation;
- be able to communicate with SME in the language of SME (owners and managers);
- be aware of the business case for competency development, including some real life examples that will be convincing for the specific Tourism SME;
- appreciate the most simple and inexpensive measures that provide the best cost-effect ratio for the company;
- ideally already be involved in interaction with the business, so that the issue of key competency development can be raised as a solution to real world problems;
- have an overview of other learning resources apart from this concept, specifically regional and sectorial resources;
- be able to accompany the SME flexibly regarding time and place;
- be aware of the concept of business and regional networking and willing to encourage networking on the issue of key competency development. Mutual support is one of the most powerful resources of SME;
- be open to the individual motivation of SME owners and managers for key competency development

While some of these characteristics will be strengthened during the consultants training, others are a prerequisite for participation, as a good understanding of English, in order to being able to take part in the discussions in the workshop.

Partners emphasized that the program for consultants (handbook and learning experience) is not intended as a beginner level consultancy or facilitation training.

The program is intended for participants with good proficiency and/or some background/training in consultancy.

The program and handbook are intended to facilitate the application of these competencies in the specific field of tourism, focus on workplace learning and introduce the specific methodologies and material developed in this project.

Within the project the consultants will mostly act as facilitators of a common learning process with the owners, managers or the management team of the hotels and restaurants.

Therefore they should demonstrate all necessary skills and aptitudes of a good facilitator, in order to teach and lead by example.

The managers, owners and management team members themselves again will further on act as facilitators of the learning process in their hotels and restaurants.

Therefore the competencies of the consultants and managers are overlapping to a high degree. The learning process with the managers will help to further develop the skills and aptitudes of a good facilitator in the managers.

A short discussion of these skills and aptitudes follows.

SKILLS AND APTITUDES OF THE FACILITATORS

In order to be a good facilitator the following skills and aptitudes are very important:

- a) Listening skills
- b) Good communication skills
- c) Pro-active attitude
- d) Positive thinking
- e) Problem solving skills
- f) Flexibility/ adaptability
- g) Ability to solve the objections
- h) Significant didactical skills, essential in knowledge transfer and skills forming
- i) Ability to motivate trainees

j) Ability of observation and making conclusions.

a. Listening skills

It is very important for a facilitator to have listening skills, in order to understand trainee's needs.

This is the first stage for the facilitation process, as the whole process will start with listening to perceived problems. The expectation of the trainee and its hopes can be discovered only with effectively listening skills.

To understand this specialty it is important to analyze those kind of questions:

Have you ever met with such a situation that you ask someone a question and you don't receive any answer or an irrelevant one?

Have you ever felt guilty, because you listen to someone but in fact you think of different things?

Have you ever felt yourself as you don't understand what you listen and more worse have you ever felt such a situation that you approve something but originally you don't know what you approve?

If you answer one or more of these questions with "yes" you should think about your listening skills.

Listening often is hard particularly for very knowledgeable people as they want to be helpful by sharing their knowledge. Developing the wisdom that listening to the partner is the basis of good and effective communication is a very important learning challenge particularly for these people.

b. Communication skills

Effective communications skills mean that in every situation, in every place to have the ability to give react adequately and authentically to all or most communication situations.

A facilitator should have ability to break the silence with reasonable sentences, encourage all participants to speak up, see that all participants can get involved, keep the discussion going, know when to let the process go and when to intervene. Among skills employed are eyes contact, using jest and mimics, knowing how to use body

language, know to change to the level of language and tone of voice according to the needs of the individual person is also are very important.

c. Pro-active attitude

Pro-active attitude means to notice new opportunities and search new alternatives for solving problems and to have the ability to practice those specialties in practical situations.

A pro-active person feels himself as much more responsible and ready beyond of ordinary responsibilities or duties expected from him.

d. Positive thinking

The most effective way to reinforce correct aptitude is to tell the trainee which aspects of their line of thought are admirable. It's important to reinforce positive thinking/attributes, because positive aptitude/behaviour that is reinforced is more likely to occur again. Positive thinking is not to be confused with unfounded optimism. Rather it is the habit to focus on things that can be changed through one's own activities. It is the contrast to an attitude of un-constructive complaining and blaming.

e. Problem solving skills

Problem Solving is considered the most complex skill the each person and facilitators in particular should have. It is a cognitive process involving modelling the problem and combining various skills in dealing with a certain situation. After analyzing the situation and defining the problem the facilitator must be able to help the group facilitated to work out suitable solutions for it.

f. Flexibility/ adaptability

Some people thrive on change and the unexpected and enjoy alteration to their routines: they are naturally adaptable. If you are the kind of person who always has a 'to do' list and doesn't like it when something arises which isn't on your list, then you probably aren't naturally adaptable.

In particular facilitators must be able to take into account the flow of the process within a group. New concerns may come up as well as new ideas. There might be circumstances that were unexpected. In all of these cases the facilitator must be able to react to these inputs, while maintaining the focus and consistency of the core process. He must be able to differentiate between random interferences which must be contained in a constructive and polite way and substantial inputs that necessitate an adjustment of the process. Being flexible and adaptable is an art that is acquired by practice and reflection. Anticipating a number of potential inputs and pre-thinking potential reactions can help improving one's own flexibility.

g. Solving the objections

It's quite natural for participants to make negative comments during training. As a matter of fact, at a certain point the participants are asked to vent out their positive as well as negative feelings about the hotel/restaurant they work for.

Facilitator reaction to these negative comments is very important. Participants feelings should not be discarded or ignored as this reaction will not make their emotions go away! The facilitator should help them reflect objectively on raised issues, make them 'transparent' and then possibly discuss them.

h. Didactical skills, essential in knowledge transfer and skills forming

These skills are necessary for preparing and conducting training and contribute decisively to training effectiveness. Also in facilitation various teaching techniques, e.g. to use audio-visual aids, to select appropriate instructional objectives and to explicitly formulate them, to give constructive feedback to trainees can be useful. This knowledge is necessary particularly to guide the management team in shaping the didactical material they and their employees will use in their self-organised learning process, like work and learning assignments, one-point instructions etc. (see *Ch. 1. handbook for managers*)

i. Ability to motivate trainees

Different people can have different motivations: by more money, more recognition, time off from work, promotions, opportunities for learning or opportunities for socializing and relationships.

Most important and desirable among them is the intrinsic motivation for the particular work, seeing its value and its potential to demonstrate and hone one's own abilities. Therefore, when attempting to help motivate people, it's important to identify what really motivates each of them. Ultimately, long-term motivation comes from people motivating themselves.

As the initial research within TouriSME showed, lack of motivation and/or sole reliance on extrinsic motivation is a main cause of problems in hotels and restaurants. Therefor the ability to reflect and develop the intrinsic value and potential of each job within a TouriSME as well as its potential for the self-development of the employee is a key ability of the facilitator.

j. Ability of observation and making conclusions

Watching carefully the working process, employees' attitudes and drawing conclusions on it is very important for understanding their needs.

Also here a keen sense for observation my help to identify barriers to learning (see Ch. XX) and also identify each individual point of excellence and strengths, which can be encouraged and further developed.

Corresponding to this is the ability not to judge an individual as a whole by an individual behaviour, skill or deficiency. A good facilitator must remain open to register weak points also in "good" persons and opportunity in those generally viewed as weak or unmotivated.

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2.5.3: Key Competencies for LLL

Due to the challenges that globalization brings to European Countries citizens have to have competences that help them to adapt to different jobs and to participate in civic life for their whole life.

In order to be able to acquire specific skills and competences citizens need more general key competences that allow them to adapt to changing conditions and to expand their own fulfilment and satisfaction through lifelong learning.

These key competences allow citizen to adapt flexibly to a rapidly changing world.

The key competences ensure equality and access also for those groups who, due to educational disadvantages caused by personal, social, cultural or economic circumstances, need particular support to fulfil their educational potential, and finally to improve the employability and the chances to have a job .

The key document that expresses the importance of key competences and describe them is: The Key Competences for Lifelong Learning – A European Framework is an annex of a Recommendation of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning that was published in the Official Journal of the European Union on 30 December 2006/L394. (http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_394/l_39420061230en00100018.pdf)

All consultants working with the guideline at hand should make sure to have read this document thoroughly, as an in depth understanding of the relevance of these key competencies is the foundation for fostering the building of these competencies through workplace learning in hotels and restaurants, which is the key proposition of the TouriSME project.

Importance of creating key competences for the benefit of lifelong learning chances of employees in Tourism

The European Countries are confronted with problems related to workers adapting to working places due to differences in competences required between countries. The same problems were revealed by the study done on IO1 Requirement Analysis Report in Turkey.

The development of key competences helps employees to adapt during lifelong to changes in the content of the work, in the methodologies and equipment used and also when changing the job. For example if you worked as a seller and you developed your mathematical competences, communication in mother tongue and in foreign languages and also the sense of initiative and entrepreneurship, you can easily adapt to an receptionist job.

In **tourism**, due to the seasonality of the work, the learning situations arise in the periods with a lot of customers and if the managers do not exploit these opportunities due to “lack of time”, they leave behind a great opportunity to help employees to learn from the mistakes.

For the employees in tourism, due to diversity of the visitors they receive and due to the diversity of the situations they meet during the work process, the workplace learning is the most important educational opportunity.

During training courses or at professional school, curricula often do not include a great range of practicing concrete working situations in order to prepare the trainees for their actual work.

Therefore the acquisition of more practical competences and skills relies on the **ability to learn** of each individual. This ability to learn depends on the level of the individual key competencies for Life Long Learning, while vice versa these competencies can only be built and expanded by actually learning.

By using the opportunities created by the real working situation in a creative, positive way, employees can develop their competences and, for example, be more careful with the customers and develop the good image of the touristic facility.

The learning at the work place can be done with interactive methods that are suitable for adults, the employees could learn better and more easily how to act in different situation than learning from a written material or a static situation. In workplace learning the team can be involved and the solutions for solving the situation can come from all personnel not only from one person, deeply involved in the situation (unpleasant in 99% of cases).

A key role in learning at the workplace plays the *reflection of the work process*, the *search for improvements* and the continuing analysis of learning needs, as well as way to meet these needs by deciding who should learn what from whom when and how. This is what the process described in this guideline is all about.

While most of the learning will address very concrete learning of individual skills, like laying a table, calculating a dinner, communicate with customers at reception, learning some key phrases in a number of languages etc. the learning of such concrete skills always also practices and improves the ability to learn more. Learning is a self-reinforcing process. The building of concrete professional competences also builds the meta competences for learning.

The European Commission, based on a broad analysis of literature and comprehensive consultations has analysed which competences are key for lifelong learning and identified the eight competencies to follow:

The 8 key competences that the European Commission considers vital for long life learning are:

a. Communication skills in mother language

Communication is the process by which two or more people exchange information, ideas and emotions. It is a bidirectional process and information is being shared

verbally (through speech and writing) and non-verbally (through gestures, posture and behaviours).

The definition of this key competence is the following:

“Communication in the mother tongue is the ability to express and interpret concepts, thoughts, feelings, facts and opinions in both oral and written form (listening, speaking, reading and writing), and to interact linguistically in an appropriate and creative way in a full range of societal and cultural contexts; in education and training, work, home and leisure.”

For this competence, the conclusions of the survey (in the scope of the initial research) in the tourism SME revealed that the learning needs as seen by the managers which answered to the questionnaires are:

- 54,9% of the managers consider that writing in mother language to be very significant for the employees.
- 64,8% of the questioned managers consider that reading/understanding written instructions in mother language is very significant
- 90,1 % of the managers consider that communication with customers in mother language is very significant.

The report concludes: “Not surprisingly, being able to communicate with customers in one’s own language is regarded as the most elementary competence.”

While many managers consider that communicating in mother tongue is something that the educational system must develop and they are not willing to spend time or money to develop this competence with the employees, bad communication is a major cause for irritation and problems in daily life as well as in businesses. Therefore communication in the mother tongue cannot be taken for granted, but is a skill that must be developed and honed throughout the lifetime.

From the business perspective probably more customers and therefore money is lost by bad communication than by deficiencies in any other competence.

b. Communication skills in foreign language

The definition of this competence is:

"Communication in foreign languages broadly shares the main skill dimensions of communication in the mother tongue: it is based on the ability to understand, express and interpret concepts, thoughts, feelings, facts and opinions in both oral and written form (listening, speaking, reading and writing) in an appropriate range of societal and cultural contexts (in education and training, work, home and leisure) according to one's wants or needs. Communication in foreign languages also calls for skills such as mediation and intercultural understanding. An individual's level of proficiency will vary between the four dimensions (listening, speaking, reading and writing) and between the different languages, and according to that individual's social and cultural background, environment, needs and/or interests."

For this competence, the conclusions of the survey in the Tourism SME revealed that the learning needs as seen by the managers which answered to the questionnaires are:

-17,6% Writing in a foreign language very significant

-71,4 % Talking to customers in a foreign language

As can be seen, a lot of managers considers that communicating with the customers in their mother tongue is very important, it is mandatory for certain positions -the receptionist, bartender, waiter, in order to fully understand the customer needs and to be able to give information or solutions.

c. Counting and calculating skills and Science

The definition of this competence is:

"Mathematical competence is the ability to develop and apply mathematical thinking in order to solve a range of problems in everyday situations. Building on a sound mastery of numeracy, the emphasis is on process and activity, as well as knowledge. Mathematical competence involves, to different degrees, the ability and willingness to use mathematical modes of thought (logical and spatial thinking) and presentation (formulas, models, constructs, graphs, charts)."

Competence in science refers to the ability and willingness to use the body of knowledge and methodology employed to explain the natural world, in order to identify questions and to draw evidence-based conclusions. Competence in technology is viewed as the application of that knowledge and methodology in response to perceived human wants or needs. Competence in science and technology involves an understanding of the changes caused by human activity and responsibility as an individual citizen.

For this competence, the conclusions of the survey in the tourism SME revealed that the learning needs as seen by the managers which answered to the questionnaires are:

-62,6% Basic Counting and Calculating very significant

-15, 4% Advanced Counting and Calculating very significant

Because more and more managers are introducing IT devices and softs for managing the hotel/restaurant they do not priorities this competence higher. Of course, the importance of this competence depends on the job description, some jobs do not require too much calculating.

d. *Using computer at work-*

Definition:

Digital competence involves the confident and critical use of Information Society Technology (IST) for work, leisure and communication. It is underpinned by basic skills in ICT: the use of computers to retrieve, assess, store, produce, present and exchange information, and to communicate and participate in collaborative networks via the Internet.

For this competence, the conclusions of the survey in the tourism SME revealed that the learning needs as seen by the managers which answered to the questionnaires are:

-56,0 % Basic using the Computer at Work very significant

- 8,8 % Advanced using the Computer at Work very significant

e. *Learning to learn*

Definition:

“Learning to learn is the ability to pursue and persist in learning, to organise one’s own learning, including through effective management of time and information, both individually and in groups. This competence includes awareness of one’s learning process and needs, identifying available opportunities, and the ability to overcome obstacles in order to learn successfully. This competence means gaining, processing and assimilating new knowledge and skills as well as seeking and making use of guidance. Learning to learn engages learners to build on prior learning and life experiences in order to use and apply knowledge and skills in a variety of contexts: at home, at work, in education and training. Motivation and confidence are crucial to an individual’s competence.”

For this competence, the conclusions of the survey in the tourism SME revealed that the learning needs as seen by the managers which answered to the questionnaires are:

- 84,6% To have ambition and willingness to learn more very significant
- 60,4% Methods of self-regulated learning very significant
- 51,6% Establish and follow learning objectives very significant
- 75,8% Ability to cope with new and unexpected situations very significant

As the high level of approval for the need to build the ability to learn shows, a process of building structures for self-regulated learning within companies, as described in this guideline, matches a high level of interest on the side of the managers.

f. Social and Civic Skills

Definition:

“These include personal, interpersonal and intercultural competence and cover all forms of behaviour that equip individuals to participate in an effective and

constructive way in social and working life, and particularly in increasingly diverse societies, and to resolve conflict where necessary. Civic competence equips individuals to fully participate in civic life, based on knowledge of social and political concepts and structures and a commitment to active and democratic participation."

For this competence, the conclusion of the survey in the tourism SME revealed that the learning needs as seen by the managers which answered to the questionnaires are:

- 84,6 % Good manners, ability to show a positive attitude is very significant

g. Sense of Initiative and Entrepreneurship

The definition of this competence is:

"Sense of initiative and entrepreneurship refers to an individual's ability to turn ideas into action. It includes creativity, innovation and risk-taking, as well as the ability to plan and manage projects in order to achieve objectives. This supports individuals, not only in their everyday lives at home and in society, but also in the workplace in being aware of the context of their work and being able to seize opportunities, and is a foundation for more specific skills and knowledge needed by those establishing or contributing to social or commercial activity. This should include awareness of ethical values and promote good governance."

For this competence, the conclusions of the survey in the Tourism SME revealed that the learning needs as seen by the managers which answered to the questionnaires are:

- 68,1% General "pro-active" attitude very significant
- 74,7 % Acting "entrepreneurial" i.e. treating every customer as if it was the employees own business very significant

The managers from tourism express their need for having employees acting more pro-active,

h. Cultural awareness and expression

The definition of this competence is:

Appreciation of the importance of the creative expression of ideas, experiences and emotions in a range of media, including music, performing arts, literature, and the visual arts.

For this competence, the conclusions of the survey in the TouriSME revealed that the learning needs as seen by the managers which answered to the questionnaires are -72,5% of the managers consider that the ability to interact with and address the needs of customers from different cultural backgrounds is very significant

This statistic data sustain the conclusions of Output 1:

“Development of a individual competence profile matching the tourism sector:

- pro-active attitude,
- positive thinking,
- good communication skills with people from different backgrounds,
- sense of pride and ownership of one´s own work,
- service mentality,
- problem solving and situational flexibility,
- long term commitment and systematic skills development.

In this sense, the aim of the learning must focus on the key competence no. 7 “Sense of initiative and entrepreneurship”.

It must be learned that work in tourism can deliver in all positions, what the Croatian partner reports as motivation of owners and executives in tourism:

- “Taking control of their own destiny
- Recognition in society
- Doing work they like
- The possibility of exploiting their potentials
- The ability to change things
- The need to realize ideas
- Financial awards”

Analysing these survey data the conclusions are that, for all the countries involved in this project, the managers consider the following competences to have the most significant learning needs and to be developed with the employees in order to have satisfied customers:

- learning to learn
- sense of initiative and entrepreneurship

An example of how the key competences relate to the tasks of a receptionist is found in chapter 2.5.3

2.5.4: Appreciative Inquiry as Consultancy Approach

Definition of Appreciative Inquiry

Appreciative Inquiry (AI)¹⁵ is the study of what gives life to human systems when they function at their best. This approach to personal change and organization change is based on the assumption that questions and dialogue about strengths, successes, values, hopes and dreams are themselves transformational (Whitney and Bloom-Trosten, 2010:1). Appreciative Inquiry is the cooperative, co evolutionary search for the best in people, their organizations and communities, and the world around them (Cooperrider and Whitney, 2008:105).

As a method of organizational intervention, the underlying assumption of appreciative inquiry is that organizing is a possibility to be embraced. The phases include (1) topic choice, (2) discovery, (3) dream, (4) design and (5) destiny (Ludema, Cooperrider and Barrett, 2001:158).

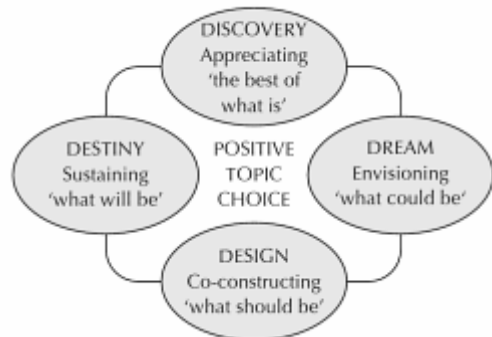


Figure 1: Phases of Appreciative Inquiry-The 4 D Model (Ludema, Cooperrider and Barrett, 2001; Whitney and Bloom-Trosten, 2010).

¹⁵ Cf. Whitney, D. & Bloom-Trosten, A. (2010). The power of appreciative Inquiry. A practical guide to positive change. (2nd Edition). California: Berrett-Koehler Publishers.

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Selecting a positive topic to explore is an essential starting point.

Discovery: Discovery is an extensive, cooperative search to understand the “best of what is and what has been”

Dream: Dream is an energizing exploration of “what might be”

Design: Design is a set of Provocative Propositions, which are statements describing the ideal organizations, or “what should be”.

Destiny: Destiny is a series of inspired actions that support ongoing learning and innovation, or “what will be”

The characteristics described above make AI the most appropriate methodology to work with for fostering the acquisition of key competencies for Life Long Learning.

Consultants and the consulting mind-set: Consulting and the method of Appreciate Inquiry

The research presented in the scope of IO 1 of TouriSME Comp revealed that TouriSME already implement a multitude of learning activities in order to compensate deficits of formal learning as well as to meet individual skills needs of the respective company.

Therefore a general approach of consulting should be used, which takes this already high level of activity into account.

One such methodology that has been proven as useful in such a setting is the methodology of “appreciative inquiry”, as described above.¹⁶

The field of developing learning strategies in TouriSME is at least as much one of exploring and adapting current practices as one of implementing new ones.

As a consequence it is very important to choose methodologies that allow for the inclusion of the company’s own understanding, activities and approaches of appropriate learning activities as much as inspiring them by giving new input.

¹⁶ This approach has been used with good success in projects like COSORE (specifically field testing in Belgium), FILIP and Learn&Work, as well as on many other occasions.

More important than imposing pre-fixed concepts on competency development will be to provide the necessary **inspiration** to companies and their owners and managers.

What consultants **can** do is *inspire owners and managers of TouriSME to generate ideas*, to keep being *innovative*, and to operate in harmony with the dynamics of the business environment, which is a continuous journey. In any case the energy, the motivation and “drive” to change and develop must come from those consulted.

Even if the clients should expect that the consultant solves their problems for them, this will rarely work, as in the long run the consultant will not be there and the business must live wholly on its own resources. Therefore the managers and owners must own the process and from the beginning decide what they want to do and what not. Consultants can help them shaping their ideas and aid them with methodologies of discovery, reflection and planning.

Therefore, specifically in micro-enterprises with very limited resources and a limited range of possible activities **it is very important not to confront these with an intimidating list of learning fields and skills and competencies to develop in an “audit like style”**.

Much more the present activities should be taken as a starting point; desirable improvements and new fields of activities should be defined and prioritized.

In most cases it proved to be advantageous to keep the process as open as possible content-wise and to leave quite wide latitude in filling it with activities of different complexity.

As a general orientation for the desirable approach of the facilitator the concept of **appreciative inquiry** (ai), as briefly characterized at the beginning of the chapter, proved useful in guiding SME.

Appreciative inquiry or „appreciative process“¹⁷ , developed at Case Western University in the USA in the early 1990s, is a form of “action research” and

17 Bushe, G.R. & Pitmann, T.: Appreciative process: A method for transformational change“ in: Organisational Development Practitioner, 23(1991) 3, p.1-4 As a general introduction: Elliot, Ch.: Locating the Energy for Change: An Introduction to Appreciative Inquiry, International Institute for Sustainable Development, Winnipeg, 1999

organizational development methodology that attempts to create new theories/ideas/images that aid in the developmental change of a system.¹⁸

What is the difference to “traditional” methods?

The key change method is to rather pay attention to **what you want more**, than to paying attention to problems.

The fundamental insight of the method is that „**social systems evolve toward the most positive images they hold of themselves**“.¹⁹ While this seems to be somewhat counterintuitive, in fact a simple self observation reveals that living up to the standards one has for himself is in fact a strong motivator. If you don´t think you have any talents or resources to draw on, listing deficiencies will further tear you down. In contrast, finding pockets of excellence, success stories and proof of competence can be a more encouraging starting point for improving those things – and of course there may be many – which in fact have to be improved. So the main idea is to transfer the level of talent and excellence that is revealed in the areas with the best performance to those where things are not so ideal.

In other words: appreciative inquiry tries to find, also in otherwise dysfunctional, frustrated and conservative organizations, at least micro-moments of peak performance in the desired dimension that can make them ready to be open to new desires and opportunities. To talk about such moments is the anchor to further develop these moments. The value is that doing so will demonstrate that the desired dimension is not something alien to the organization, not fitting its structures and capabilities, but that it is already there, ready for further development.

This changes the perception of reality within that organization and makes it open for development.

The desire for further analysis may arise and as a consequence also problems might become discussable that had been a taboo before!

18 Cooperride&Srivastva 1987 cit. In Bushe, G.R.: Five Theories of Change imbedded in appreciative inquiry.

<http://www.gervasebushe.ca/ai5.htm>

19 Bushe a.a.O.

The rationale for this approach was the experience, described by many consultants for organizational development, that often, seemingly hard headed inquiries into problems and deficiencies within an organization are started, but the results are often frustrating. Such inquiries often mobilize the “immunization system” of organizations against change instead of promoting change.

Confronted with their own deficiencies most organizations react with defensive strategies against change because it is hard to acknowledge deficiencies and failures out of fear of appearing incompetent or disloyal. Finger-pointing starts and the social balance of the organization can falter. It can therefore be concluded that the standard method of consulting and organizational development are an even more risky experiment than innovative approaches.

Confrontation with the reference system of externals often puts organizations on the defensive. Especially being confronted with consultants to whom they attribute a higher competency, can put the organization or at least many of the people within it, psychologically to the defensive. They feel judged and criticized instead of consulted. In summary, problem-focused techniques often are “painfully slow, rarely result in new vision and generate defensiveness”.²⁰

Focusing on deficiencies alone also is quite unjust. After all, as the research in the scope of IO 1 of TouriSME revealed, many of the hotels and restaurants surveyed are existing for quite some time. Surviving in a turbulent and competitive market place means that the most have done a few and probably most of the things right. So there are competencies to build upon. Studying customer feedback and other indicators on the other hand also reveals that often also there are some things that leave quite some room for improvement.

Among them is the inability of the sector as a whole to present itself as an attractive and worthwhile field of professionalism even to many of its actual employees.

20 Cooperrider, D.L.: Resources for getting appreciative inquiry started, in: OD Practitioner 28(1996)

Every attempt to change what happens within organizations has to start with trying to **influence what is talked about and what is appreciated** in the specific organization.

The process described in this handbook does exactly that. It starts with revealing the development and strengths of the hotel and restaurant, helps to define a positive vision of development and puts a holistic programme of learning of the hotel/restaurant as an organization as well as the learning of its employees at the centre of attention.

Learning and the development of competencies for lifelong learning are put in the focus of attention. It is discussed widely that the development of the competences is in fact a core business process and therefore deserves attention. Rarely it will be possible to make any innovation or improvement without management and employees learning new things.

The process therefore helps the organization to view the whole business process from a learning perspective. This way learning needs become apparent, but also learning opportunities will be more obvious and accessible.

Therefore the steps in this program are based on the steps identified as typical for AI.

Elliot, from the background of a multitude of development processes using ai, defines four typical stages of the process:

Discovering periods of excellence and achievement: Through interviews and storytelling participants in the process remember past achievements and points of excellence in the field discussed. What happened to make those achievements possible?

This takes place in Step 1, 2 and partly 3

Dreaming an ideal organization or community: People use past experiences of excellence to envisage the desired future. Unlike abstract strategic planning these

visions are based on the positive present that the organization seeks to expand, to strategically expanding the organizations' demonstrated potential.

This is addressed in step 2.

Designing new structures and processes: In this stage through consensus concrete short- and long-term goals are developed. Proactive propositions should stretch an organization, but they should be achievable because they are based on existing points of excellence

This is addressed in step 3 to 5

Delivering the dream: People act on their provocative propositions, establishing roles and responsibilities, developing strategies, forging institutional linkages and mobilizing resources to achieve their dream. People will have a better understanding of the relevance of new initiatives in respect to the long term vision of the organization.²¹

This stage is developed gradually in between the meetings initiating each step, but particularly in step 6 and in the aftermath of the consultancy phase, when the hotel or restaurant implements its new system of competency development.

²¹ Elliot a.a.O., p.4

2.6: Helpful Resources

There are many external resources that might be helpful for working as a consultant/facilitator in this project.

The usefulness of each of them depends on the degree of prior experience of the person and also personal preferences.

The material linked has been produced in different context and mostly represents a general introduction to the topic. It is referenced here to provide access to potentially useful resources. However the recommendations given there may differ from the guidelines of the guideline at hand.

The reference therefore is for information only but does not represent a recommendation.

General introductions to facilitation:

<http://oqi.wisc.edu/resourcelibrary/uploads/resources/Facilitator%20Tool%20Kit.pdf>

<http://www.workshopexercises.com/Facilitator.htm>

<http://seedsforchange.org.uk/tools.pdf>

<http://www.uspto.gov/web/offices/com/oqm-old/Facilitation.pdf>

<http://www.unhcr.org/4371d7c92.pdf>

....and many more....

As you can see, some of the chapters includes the used Bibliographies for elaborating the materials

2.7: How to contact Companies, Occasions for Consulting

The consultants have good relationship with the managers. The occasions for discussing the opportunity of workplace learning are multiple. Using specific networking methods, consultants can present the opportunity of facilitating the self-learning at workplace. Also, when a company is seeking consultancy, during the needs analyse, the consultants can introduce also the facilitation of workplace learning.

A good opportunity to contact the companies is by the professional associations or associations of the owners/ managers from tourism. Taking part to the events of the associations is an occasion to contact managers/ owners. Also, after the presentations, the consultant can find a topic that is related to human resources and can present briefly some of the benefits of workplace learning.

In Romania, the SME's are seeking consultancy especially when they need investments in equipment and are looking for European or Governmental funds. But, because they become more interested in keeping the employees, they are looking for training courses as a motivational resource.

How do you contact the decision makers?

How do you convince them to accept your consultancy services?

How do you think they will accept the concept of facilitating the self-learning at the workplace?

These are some questions that the consultants have to answer when preparing the meeting with the owners/ managers.

The Analyse of the stage of tourism (IO1) was the first meeting of the owners/managers from tourism with the project TouriSME Comp. Using the conclusions of IO1 the consultants can meet again with the managers that answered to the questionnaire and/or participated to the focus group. It is a great opportunity to discuss with the managers and to begin with step 1 of the facilitation process.

During this first meeting can be also discussed the participation of the manager to the events that are planned and also to the training for managers, which are activities in our project (Ch. 2.2).

Be confident and use the appreciative inquiry technique during the meeting. Discuss about the strengths of the business, the values of the owner, success, hopes and dreams. The arguments for convincing the managers to reflect on their business could be related to the competitiveness of the company, the labour productivity, the rating on TripAdvisor or Booking, the fluctuation rate or other soft indicators of the business.

2.8: Results of the Analysis of Learning Needs of TouriSME and their employees

The results of the analysis of the situation of TouriSME and their learning needs can be found on the webpage of the project.

The results for **Romania** are summarised in this chapter.

Material for Step 1

2.9 Notes for the facilitator on WS 1

Results:

- Facilitator and Client have reflected the general situation of the hotel or restaurant
- Facilitator is aware of specific situation, challenges and resources of the hotel/restaurant
- Client has got new insights and inspiration by interacting with the external partner
- Client is aware of importance of competency development and current practices in its own establishment

As in all parts of the process tools to be used are **optional** and specific to the situation, although it is highly advisable to follow the general structure and concept. The process should not be rushed, true insight and understanding is more important than mechanically using the tools without real insight and learning.

The reflective interviewing guideline (Ch. 2.10) supports the initial dialogue between consultant/facilitator and client. The most important characteristics of the company

and its general understanding of learning and training, customer relations and potential of learning for better business results are discussed.

The main aim is to help the owner/manager of the hotel and restaurant to think about his hotel/restaurant in a systematic way. Often talking about an issue to a partner leads to new insights popping up, particularly if the partner limits itself to asking questions. These can be specific, (like: what measures have you taken in the last 5 month to train your employees?), but often quite unspecific question prove to be even more productive. These are questions like “why?”, “tell me more about that”, etc. which encourage the partner to dig somewhat deeper below the surface of the obvious answer.

Where the hotel or restaurant has taken part in the initial survey within TouriSME the information available from that can be used as a starting point, deepening the understanding.

On the one hand this provides information for the facilitators about the starting point of the work within the specific company. On the other hand, as the implementation of the tool in many cases revealed, the interviewing dialogue also leads to new insights on the side of the interviewee, since presenting the own company and its challenges often leads to a reflection of this and often for the first time to an explicit formulation of these characteristics.

This is the prerequisite for further analysis and discussion.

This can be enhanced and deepened by explicit feedback given by the facilitator in the form of a short written note on the interview (Ch. 2.15).

This on the one hand documents what has been said, but even more importantly lets the manager see, how the situation is perceived in the “mirror” of an external. This often reveals which relevant points have not been mentioned or where further analysis is needed.

2.10: Interviewing Template „Reflective Interview for hotel/restaurant owners/managers

Date:

Name (of facilitator):

Hotel/restaurant:

Number of employees:

Interview partner (s):

Position(s)

Short Description of the Activities:

What are the general characteristics of your hotel/restaurant?

(Discussion points: organisation, customers, outreach)

How did the hotel/restaurant develop?

What are the main resources (strength) and challenges?

What did change in recent years?

Learning Policy:

What is your policy concerning your employees? (hiring, fluctuation, qualification, motivation)

How do you hire and train your employees?

Do you have an explicit learning policy?

Can you describe situations in which training went particularly well?

Can you remember a situation when you liked your performance as a trainer / coach of your employees particularly well?

Can you describe a situation when an employee surprised you with unexpected initiative and skill?

How many employees leave your company per year? Is that of concern for you?

Are there situations where you think your employees could need more qualifications?
Are there customer complaints or other quality problems?
Can you describe situations when managers or employees were particularly active in teaching their own skills to other employees?

2.10.1 SWOT Analysis of the hotel/restaurant

As an alternative and/or continuation of the appreciative interviewing in cases where the consultant already knows the hotel/restaurant well, it can be appropriate to use the more in-depth and systematic methodology of a SWOT analysis.

Consultants should note that a fruitful application of this methodology requires a basic understanding of the hotel/restaurant and also implies the existence of a level of trust between consultant and owner/manager.

In general a phase of exploration and free format dialogue should precede the phase of systematization of the discoveries from this phase. Then however, most of the time this additional exercise can help to gain additional insights.

⇒ **SWOT Analysis** (analysis of **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats) is an important tool for diagnosing the situation of workplace learning and the environment in a company.

SWOT analysis consist in identification of strengths and weaknesses of workplace learning, which are related to internal factors, respectively identification of opportunities and threats for workplace learning, which are related to external factors.

Main phases of SWOT analysis in case of workplace learning includes:

- identification of main strengths and weaknesses of workplace learning in the company, compared with competitors

- identification of present and future opportunities and threats/ risks for workplace learning
- identification of critical aspects: does strengths helps to capitalization of opportunities and lock of threats?; does weaknesses lock/ brakes the capitalization of opportunities?
- defining of success factors (+) that represent key aspects for company strategy related to workplace learning
- The results of SWOT analysis allow the identification of opportunities and critical points for workplace learning. **The company should develop based on capitalization of strengths and opportunities, try to eliminate/attenuate weaknesses and be insured against threats.**

For understanding better, please find below an example of factors included in SWOT analysis for a Tourism company:

<p><u>STRENGTHS (+)</u></p> <p>Responsible management and open to workplace learning</p> <p>Qualified and experienced personnel of the company</p> <p>Motivated personnel</p> <p>Existing of good practices for workplace learning (in the company)</p>	<p><u>WEAKNESSES (-)</u></p> <p>Weak management</p> <p>Low qualification of personnel</p> <p>Low motivation of personnel</p> <p>Lack of resources for workplace learning</p>
<p><u>OPPORTUNITIES (+)</u></p> <p>Increasing of importance of workplace learning in tourism sector</p> <p>Rapid evolution of technology and information</p> <p>Availability of qualified workforce due to European projects for HR</p>	<p><u>THREATS (-)</u></p> <p>Low interest for qualification from young graduates</p> <p>Economical crisis</p> <p>Lack of qualified workforce</p>

In order to identify the better strategy for workplace learning it is useful to elaborate *SWOT matrix*:

		OPPORTUNITIES			THREATS		
		1 ...	2 ...	3 ...	1 ...	2 ...	3 ...
STRENGTHS	1. ...		X				
	2. ...						
	3. ...			X			
WEAKNESSES	1. ...					X	
	2. ...						
	3. ...						

By comparing the strengths with opportunities and threats, the weaknesses with opportunities and threats, it could be choose the best ***strategy for workplace learning***, from the following types of strategies:

Strategy S-O has in view to capitalize the opportunities that are related to strengths of the company

Strategy W-O has in view to surmount weaknesses in order to capitalize the opportunities

Strategy S-T has in view to identify the modalities through the company can use strengths in order to reduce the vulnerability to risk factors

Strategy W-T has in view to establish defensive methods in order to decrease the impact of weaknesses to threats.

Exercise

SWOT analysis for a specific tourism SME.

2.11: Background Information: Drivers and Barriers to Learning in TouriSME

Organizations need staff to learn new skills constantly. Every manager wants her team to have greater understanding of the customer, products and market better. But organizations have some barriers to learn in workplace area. Organizations have some excuses to disregard to learning such as lack of time. Most of us can't implement all the things we like to do in working day. This causes us to choose between short term deadlines and long term goals. The other barrier element is that team can seem uninterested in learning. In some organization, employees are afraid to ask question or request a help for any gap in their knowledge or experiences due to the fear of being understood as a weakness. Desiring to learn in organization may be overwhelmed by the need to protect the position and job.

Here are some barriers on learning in Organizations: (Senge, P, 2004: 17-20)

Barriers to Learning	Expression	Related Competence Which competences are lacking	Example
I am in my position	<p>This is a learning problem from personal level.</p> <p>Some employees think their responsibilities in job as limited to the borders of their current position.</p>	<p>When asked what they do for a living, most people describe the tasks they perform every day, not the purpose of the greater enterprise in which they take part.</p> <ul style="list-style-type: none"> • Lack of taking responsibility enough • Lack of proactivity • Lack of team-work 	<ul style="list-style-type: none"> • In hotels, it is very important the relationship and harmony among departments. In service industry relationship and behaviors is a part of service thus human factor is very important. In hotel sector, employees don't have right to think this is not my job or position because there is strict relationship among all departments. • For ex: The front office staff interacts with all departments of the hotel, including marketing and sales, housekeeping, food and beverage, banquet, controller, maintenance, security, and human resources. These departments view



			the front office as a communication device in providing guest services. Each of the departments has a certain communication tie with the front office staff.
I am not guilty, The enemy is out there	<p>When things go wrong, most of us try to find someone to blame.</p> <p>The enemy is out of there" is a result of "I am in my position".</p> <p>When we focus only on our current position, we can't forecast how our own facilities extend beyond the boundary of that position.</p>	<ul style="list-style-type: none"> • Tourism industry is not a sector for blaming others for guilty, otherwise, most of the problems will reflect to the other departments as well. • This problem will bear on all departments and finally will give reason to function error for most departments which have relationship with each other 	<ul style="list-style-type: none"> • The timing of food being ordered and delivered to the table can be a problem that comes up in a practicum because restaurants get busy and the chefs have to keep up. When they do not, or if food arrives at the table cold, a manager has to solve the issue with the employees and placate the customer • You can't blame someone for this problem. Because customers don't interest in your busy or other problem, they want to be happy and spend good times" you can't tell them I am nit guilty, and if you

		<ul style="list-style-type: none"> • In problem situations, it is very important to be contact with other departments so that you should solve the problems completely • Lack of taking responsibility enough • Lack of proactivity • Lack of team-work 	<p>search someone to blame, so you will not take experiences so this will be barrier of learning. Learning from bad experiences is a learning activity as well.</p>
<p>Unwilling to take charge</p>	<p>When we face up with problems, we should give up waiting someone to do something or solve problems; otherwise the problem can change into crises.</p>	<ul style="list-style-type: none"> • Lack of observation and making conclusions • Lack of proactivity • Lack of team-work 	<ul style="list-style-type: none"> • Tourism sector need to collaboration and good harmony among employees. Because tourism sector is depend on customer pleasures. "Customers are always right". So we don't have change to make unhappy to a customer because then event will spread person to person. All customers are a device of advertisement as well. • Because a happy and satisfied customer from your enterprise will do your advertisement to his/her friends or family. But if customer



			<p>faces with bad event, he/she will reflect it to other people as well. So a bad situation in hotel or restaurants, every staffs should take charge to destroy the source of wrongness.</p> <ul style="list-style-type: none"> • Thus every employee will learn new things with new experiences. "
Remember The Story of Boiled Frog	<ul style="list-style-type: none"> • "If you place a frog in a pot of boiling water, it will immediately try to scramble out. But if you place the frog in room temperature water, and don't scare him, he'll stay put. Now, if the pot sits on a heat source, and if you gradually turn up the temperature, 	<ul style="list-style-type: none"> • It is very important to forecast the process improving gradually, you should give your attention to some events as well which are hard to detect or forecast without a deep looking. • Lack of foresight • Lack of making 	<ul style="list-style-type: none"> • "In hotel or service industry, as mentioned the relationship among departments, the fixation just on a certain event will be big problem because it will block you to see the possible events, what will do in next 2 hours. You can't control on future possible events. You should be aware of all departments' facilities."



	<p>something very interesting happens. As the temperature rises from 70 to 80 degrees F., the frog will do nothing. In fact, he will show every sign of enjoying himself. As the temperature gradually increases, the frog will become groggier and groggier, until he is unable to climb out of the pot. Though there is nothing restraining him, the frog will sit there and boil. Why? Because the frog's internal</p>	inference	
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	<p>apparatus for sensing threats to survival is geared to sudden changes in his environment, not to slow, gradual changes"</p>		
<p>Resistance to Change</p>	<ul style="list-style-type: none"> • There are several reasons why employees resist change in the workplace. • Most of people are inclined to preferring stability in their personal and professional lives. So, people typically avoid situations that upset the order of things, threaten their self-interests, increase stress, or involve risks. When faced with 	<p>There are many reasons for employees to resistance to changes</p> <p>Here is some reasons in below titles</p>	



	changes to the status, people usually start to resist to that changes.		
Fear of losing the job as a resistance to change	<ul style="list-style-type: none"> In an organizational, any process, technological advancement, systems, or product change will provide working smarter, cost reduction, efficiency, and faster turnaround times to organization. But this may cause that staff and managers will resist the changes that result in their roles being reduced or annihilated 	<p>From their perspective, your change is harmful to their position in the organization.</p> <ul style="list-style-type: none"> Lack of innovation Prejudice 	<ul style="list-style-type: none"> New technological programs or new reservation system may be bad image on front office staffs. Because they feel to lose their job because of programs perform the duties that front office staff would do." So they may show resistance to change in that technology" Or in restaurants with technology there are machine to do delicious café, but the employee can think that if machine do café, why I am here. What is my job or anything or if the numbers of machine are

			<p>increase then I can be laid off?" so they would be resistance to change and this idea will be barrier to their learning activities as well. Because they will be resistance to learn new technological progressing and in long terms this situation turns the hotel or restaurant as out of date and for people technological structure of hotel or restaurant can be a way of choosing them. So they will face to lose customers.</p>
Bad Communication Relationship as Resistance to Change	<ul style="list-style-type: none"> If you don't explain why, how, when, who and the expected success will look like or how this expected success will be measured then it is inevitable to face with a resistance. If the employees don't get the 	<ul style="list-style-type: none"> When upper management plans and communicates early and effectively with all employees and explains the reasoning behind the change, employees are much more likely to believe and trust in it Lack of communication in organization 	



	necessity of change, they will not change their position especially those who are happy to current way of system		
Fear of Unknown as Resistance to Change	<ul style="list-style-type: none"> In the period of change, some employee may seem to look for past experiences because it was more trustable, secure and conjecturable. So they would think why to change if the past experiences and what they did work well. This is because of the fear of they will not achieve as much in future. 		<ul style="list-style-type: none"> Whatever fear is keeping you from reaching your goals becomes a barrier that prevents you from being the best person you can be. Once you determine what you are afraid of, visualize the worst thing that can happen; then, visualize the best thing. Often, the return for facing the fear and overcoming it is better than anything that would happen to you if you fail.
Lack of Competence as Resistance to Change	<ul style="list-style-type: none"> A change in organization will necessitates changes in skills as well. And some 		



	<p>employee may feel they will not be able to make changeover well and some employees may be inclined to hesitate to try new things thus they may show a reluctance to learn anything different. They may have some excuses like I already know all the things needing for this job. I have experiences and good at what I do so no need to go into the places unknown.</p>		
<p>No Reward as Resistance to Change</p>	<ul style="list-style-type: none"> Some employee can resist change when they think there is no point in doing it in terms of rewards. Reward is a motivation for employees, without it, it is hard to create to change for long term. Namely organizational reward facilities must 	<ul style="list-style-type: none"> Lack of Motivation 	<ul style="list-style-type: none"> Comparing with other sector, the hotel industry has no certain holiday, and employees are required to work all days a week. Furthermore, unattractive working atmosphere of the industry such as low pay, rigid job traits, long working hours, seasonal employment, over workloads, problem on job security, and limited training and development

	be adapted to support the change then organization wants to do.		opportunities contribute to job dissatisfaction, thus leading to a high level of turnover in hotel industry (Yih and Htaik, 2011). In view to this, tourism and hospitality managers need to seek effective ways to enhance the performance of their frontline employees and to keep them satisfied (Karatepe et al., 2006)." So rewarding will be good idea
Former Bad Experiences with Change as Resistance to Change	<ul style="list-style-type: none"> Reaction of something is mostly determined by the way we have experienced in the past. If employee has handled change badly in the past, then he will think the resistance as a rational way. In personal life of employee, 	Lack of learning from wrongness and experiences	<ul style="list-style-type: none"> Employees, who live in the same house for long time, shop at the same shop every day, visit the same social club, and drive the same way daily throughout their successive years may have more difficulty dealing with change than people who grew up in several different environments
No Support System as Resistance to Change	<ul style="list-style-type: none"> Employee in their current position, they already do what expected from him/her. They know that in their 		

	<p>current position they have support but if changes come, they are worried that with new supervisor, in a new team or on unfamiliar project, they will be on one there to support him in case he fail or do wrong something. In a new atmosphere, employee may feel to be alone and if I do something wrong, I would be punished and there is no one to defend me here. So they will be resistance to change.</p>		
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Lack of Awareness

Poor Self-Awareness (Williams, Kiel, Doyle, & Sinagra, 2002): Self-awareness can be described as an admiration of the influence of the past and the power of emotions that associate to help individuals achieve conscious influence over their behaviours. Learning and performance in a bundle of intense change requires individual learners to understand their default settings in order to safely and creatively find out potential changes that the situation requires. High levels of self-awareness enable learners to know what they want and have a plan of action to get it. With nominal levels of self-awareness, individuals often do not have a firm understanding of their strengths, weaknesses, preferences, styles of communication, and decision-making processes nor do they understand how they are perceived by others and what is necessary to gain support for their opinions and options. In environments where learning and performance attempts are not independent, high levels of self-awareness are critical for negotiating the relational aspects of change.

Low Emotional Intelligence (Salovey & Mayer, 1990; Goldman, 1995): Defined as a person's skill to effectively track and discriminate between one's own and others' feelings as a means of improving thinking and behaviour, emotional intelligence is regarded as serious competency for effective workplace learning and performance. Supernal levels of emotional intelligence lead to skilful self-awareness, self-management, social awareness, and relationship management. Nominal levels of emotional intelligence create gaps in one's skill to perceive and understand emotions and to influence interpersonal success.

Limited Learning Expectations (Argyris & Schon, 1978): People carry anticipation from the past about what is or is not possible based on existing knowledge. What people know now makes it tough to know new and different things. As a result, learning and



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performance activities are naturally constrained by these limited learning expectations.

Failure Avoidance (Bandura & Locke, 2003): Individuals set nominal expectations, deny to undertake specific activities, or devalue activities they attend in as a pre-emptive measure toward preserving a sense of competence and deflecting nominal skill. Failure keeping away conducts can prevent learning and performance activities from even starting.

Negative Perception (Sostrin, 2008): When the prospect of change is found out within a learning and performance initiative, people must perceive it as necessary and constructive if they are to genuinely embrace the actions and stir up the dependence required for making the proposed change a reality. When negative feelings persist, motivation and commitment decrease and change is often resisted or even sabotaged.

Management and Leadership Barriers

Ineffective Change Management (Lewin, 1951): Change is a central constituent of all training activities. According to Lewin's model, studied change involves three components: unfreezing, movement, and refreezing. By first unfreezing current patterns of manner, an analysis of attitudes, beliefs, and values can inspire personals to make subsequent adjustments in the form of desired movement and change. Upon making these changes, the new pattern of manner can be refrozen so that it remains secure in the face of future change. Unsuccessing to apply effective change management to the developmental components of learning activities can drop the long-term positive effects of those activities.

Negative Learning Cycles (Nelson, Watkins, & Marsick, 1993): When too many changes are introduced over a short period of time, learning is truncated and change



tiredness occurs. As change initiatives fail, trust eats away and the repeated experience creates a negative learning loop.

Insufficient Leadership Capacity (Brinkerhoff, 1997): Enough leadership capacity ensures the organization with the abilities and knowledge required to effectively formulate the strategic and operational plans and goals to successfully lead the organization and its workforce. With inadequate levels of leadership competence, a climate of optimal learning and performance cannot be established as the critical function of strategic and goal alignment is not met.

Autocratic Decision Making (Sostrin, 2008): Autocratic decision making is an substantial type of decision making in organizations. Basically, when one person makes the judgement alone this is considered autocratic. When a quick decision is needed due to crucial timelines, or if the nature of the choice concerns matters with little impact on others, autocratic decisions are proper. However, considering the significance of self-direction and autonomy as keys to successful adult learning, this type of decision making can lower positive attitudes required for successful learning and performance. When it comes to workplace learning, decisions that are made with no input they may lead to mistrust, low morale, lack of investment, and uselessness during the implementation of decisions.

Over Use of Short-Term Leadership (Gilley, Boughton, & Maycunich, 1999): When organizations select foreign consultants to enhance and practise learning and performance initiatives, these short-term leaders often undermine the efforts of long-term change that must be owned and managed by the internal management team.

Poor Measures (Pfeffer & Sutton, 2000): Measures are powerful benchmarks that influence behaviour and draw attention to specific business concerns. When what is



measured is actually not reflective of the organization's most crucial issues, these poor measures serve as traps that can prevent learning and performance goals from sustaining the important accountabilities required to demonstrate their efficacy.

Lack of Positive Behavioural Support (Koegel, Koegel, & Dunlap, 1996): Positive behavioural backing refers to the broad processes and interventions of assisting individuals and teams to acquire accommodative, socially meaningful behaviours and to overcome patterns of destructive, incompatible and stigmatizing behaviours.

Poorly Designed Learning and Performance Tasks (Caproni, 2005): Well-designed learning and performance tasks have clear limits, established and agreed upon aim goals, and actionable steps for accomplishing the stated goals. These ingredients lead to a sense of noteworthy purpose and they contribute to the balance of autonomy and accountability required for successful learning and performance change. Inadequate designed learning and performance missions can drift in their scope, change objectives in midstream, and leave learners without the proper context and support to achieve their goals.

Powerful and effective leadership, which is uppermost for tourism and hospitality organizations, is also related to performance, employee satisfaction and endorsement, and organizational productivity and success. Leaders should enhance a vision of the organization's future that embraces values, goals, and strategies that employees can understand, support, and believe in. The 'flag-bearer' must communicate the vision and reveal employees to realize the vision. In addition to articulating a vision, hospitality and tourism leaders should have interpersonal and communication skills, flexibility, a strong personal dignify system, transformational leadership qualities, the ability to listen, a capacity to trust others and to inspire trust in others, a willingness to persevere, effective communication skills, determination, hard work, behavioural



integrity (congruency between words and deeds), loyalty, and a caring attitude towards employees. Leaders should set achievable aims for employees and provide clearly defined roles, means, and rewards to achieve these aims. As Berry (1999, 237) succinctly puts it, "Leaders articulate the company's reason for being, define the meaning of organizational success, live the company's values in their daily behaviour, cultivate the leadership qualities of others in the organization, assert core values during difficult times, continuously challenge the status quo, and encourage employee's hearts with caring, involvement, participation, opportunity, fairness, and recognition." (Kusluvan et. Al., 2010).

2.12. Some Strategies to Optimize Learning Processes In SME

Reducing the Fear

In an organization, you are not supposed to know all the answers of things. This is ok not to be expert in all jobs. But anyways, it will be better to discuss the gaps in their own knowledge. With a meeting, they should show their voluntariness to question and to change their mind. A good enterprise should encourage employees some experimentations such as scenario-based discussions and should celebrate employees who progress their specialist skills

Understandable Purpose

The skills that are applicable to real-business challenges is the key. Of course it is important that those challenges should worth handling. A learning organization gives their employees a reason to gain new skills by mixing the daily task with a larger purpose that is reasonable. It is very important to believe that what we do matters before we will learn how to do it much better

Encourage Collaboration



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During all our lives, we are mostly encouraged to work according to personal goals. We mostly put our necessities before those of community. When we plan our future, we do according to our advantage namely individualistic way. When we take a job, we are given to a certain job description including a list of duties peculiar to us alone. In an enterprise, lack of shared goals is barriers to collaboration. Trusting each other and shared goals help encourage it. Collaboration and co-operation in the workplace helps strengthen the business. Of course collaboration isn't the only problem solving, it is important to sharing knowledge and ideas to employee to work better and more successful.

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2.13: Visioning the TouriSME I: “What would you like the situation to be three years from now?”

An important part of any consultancy process using ideas from “appreciative inquiry” is the elaboration of a positive vision of the future.

The aim is to

- motivate and
- orientate

the participants.

A more complete vision of the future and a precise formulation of the TouriSME own unique selling proposition and key mission will emerge only gradually.

A general view of where the management team wants to go is necessary however in order to get closer to such a vision.

This general vision should be broken down to general aims to be achieved concerning the key players involved, the management team (often identical with the owner(s), the customers and the employees.

If a SWOT analysis has been used, the results can be used also here.

If a general vision is formulated, more a more operational analysis of resources and barriers to get there can be made.

Exercise:

Please discuss: What should be the situation regarding these yourself, the customers and your employees in 3 years!

Write the name of each stakeholder on one **flipchart paper** each.

If there are very many stakeholders choose the top 5!



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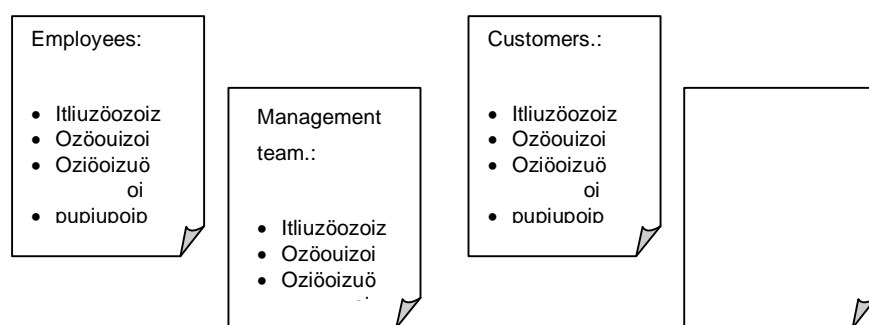
Go through the list of the stakeholders, starting with the first one and collect ideas.

In three years the situation should be.....

Collect visions brainstorming-like and write them down without being too critical concerning realism and feasibility!

Document the results (photograph, but also don't forget to take the flipcharts with you!)

In three years the situation should be.....(Example)



Note: the aim here is not an in depth scientific analysis, but to raise the awareness for the network of mutual impacts and relationships and visions for the development of the relationship with the most important stakeholders.

This will help to broaden the perspective and prepare for the discussion in WS 2.

The aim here is to mobilise the thinking about a strategy. It cannot be expected to nail down the strategy in the first run.

This would even be counterproductive.

The time between the first two workshops will be needed to let the insights sink in.

You will then work out the visions much more precisely and get to very concrete plans of activities including indicators of achievement later on.



At this point it is desirable not to be strict about the realism and feasibility of ideas and visions for the relationship.

The discussion should aim at the desirable rather than expected.



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2.14: Template: Visualization of next Steps

At the end of each step the group should discuss and agree the next steps in very concrete terms.

The results should be documented.

The aim of the exercise is to fix the agreements and to get used to using a systematic overview of aims and steps towards these aims.

In step 1 a very basic template is used, while later on more complex discussions, which add value by using indicators, resources etc. chapters can be added to the template.

Using these templates will strengthen the ability and routine of the TouriSME to work more systematic and persistent.

The following template and example can be used to plan in detail the next steps. Also the template can be used on the evaluation step as the base of the discussions regarding the activities done, the results and what can be used for building the workplace learning system

Stakeholder in Tourism	Vision the situation in 3 years
Owner of the hotel/ restaurant	
Management team	
Customers	
Employees	
Local authorities	
Etc	

For incouringing the managers to develop the systematic approach to workplace learning, introduce the following exercise to help them to plan and agree to the next activities that will take place to accomplish the 6 steps.



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Example:

Template: Next Steps

Activi ty	Specific Actions What to do?	Who	Resp on- sible	Start/ End	Comment	Done

Example: Next Steps

Activit y	Specific Actions What to do?	Who	Resp on- sible	Start/ End	Comment	Done
Write feedback paper	Review notes	Smith	Miller	4.5. 2016	Take care to include hints for exercises already used, review seminars mentioned by manager	
	Write paper					
	Forward to TourISME					
		
Discuss visions for	Find date	Costas	Vieira	4.5.-6.7.	The first ideas must be expanded. The connection between the aims must be	
	Make workshop					



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stakeholders in management team	Document workshop				discussed	
	Forward notes					
Etc.						

2.15: Template: Feedback Paper

Name of facilitator

Step. No.

TouriSME Logo

Partner Organisation Logo

Date:

Name (of facilitator):

Hotel/restaurant:

Number of employees:

Interview partner (s):

Position(s)

Documentation of Conversation

General characteristics of the hotel/restaurant?

(Discussion points: organisation, customers, outreach)



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Development of the hotel/restaurant develop

Main resources (strength) and challenges?

Change in recent years?

Learning Policy:

Policy concerning employees? (hiring, fluctuation, qualification, motivation)

Situations in which training went particularly well

Situation when you liked your performance as a trainer / coach of employees



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Situation when an employee surprised with unexpected initiative and skill

Critical situations, which reflect a need for action, e.g. employees leave the hotel/restaurant, customer complaints etc.

Other:



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Material on Step

2.16 Notes on Second Meeting Structure

Results:

- Facilitator and Client have reflected the vision of excellence and learning
- Facilitator is aware of specific situation regarding the key competences needed to be developed
- Client has got new insights and inspiration by interacting with the external partner
- Client is aware of importance of competency development and current practices in its own establishment
- Client is planning the activities for developing the key competences

As presented on step 1, the process tools to be used are **optional** and specific to the situation, although it is highly advisable to follow the general structure and concept. The process should not be rushed, true insight and understanding is more important than mechanically using the tools without real insight and learning.

The assessment of individual competences (Ch. 2.25.4.1) filled in by the manager/owner helps the dialogue between consultant/facilitator and client. The most important goals and objectives that the manager reflect on and set for better business results are discussed.



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The main aim is to help the owner/manager of the hotel and restaurant to think about his hotel/restaurant in a systematic way and to begin to plan activities for developing the business.

Do not forget to use the appreciative inquiry.

The template for planning the activities (Ch. 2.24.3) can be filled in and in the following steps more details can be added. Plan this second meeting after at least 2 weeks. The process for all the 6 steps has to be workshop-implementation-workshop-implementation, etc to have better results and to have time to implement small changes.



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2.17: Visioning the TouriSME II: Definition of Vision and necessary Competences

Note: In this exercise the group builds on the results of the discussion inspired by the reflective interview.

The aim is to focus the general reflection and achieve a compact expression of the general mission, vision for the next years and strategic themes of the TouriSME.

This focussing of the general aims will in the next step be utilised to identify the key competences the hotel or restaurant will need in order to support this vision.

As the consultant your job is to facilitate elaborating or clarifying the mission, vision and corresponding competency building strategy.

Basic Concepts

Building a positive picture of the future is a very important step in appreciative inquiry consultancy processes.

Without a goal what should be achieved there is no criterion to identify progress or deficiencies.

E.g. if a hotel is not sure about its target market, it does not know if it is good or bad if employees do not speak English. It could be good, because uneducated employees are cheaper, it could be bad, because foreign customers and employees cannot communicate and customers stay away.



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If learning activities and the human resources strategy in general is not aligned to such visions and goals, the owner will never know if the resources spent are an productive investment or a waste.

Therefore any planning for improvements must begin with a clarification of the identity and goals of the hotel and restaurant.

In this step we define the mission and vision as follows:

A **mission statement** addresses core beliefs and values and identifies target markets and core products.

A mission statement should be inspirational.

The mission should give an answer to the following questions:

“What are we here to do? What do we stand for? What do we want people to know us for?”

The mission should be specific for the individual hotel or restaurant. It should be formulated in a way that it distinguishes the specific hotel or restaurant from others. Why should customers visit this hotel/restaurant and not others? Why should they pay for the service? What is the benefit for the customers?

A **vision** should reflect the main goal of the decision makers (owners) of the hotel or restaurant for what the hotel or restaurant should become. The vision is the mission in action. It describes what customers will be able to see if the mission is implemented. What does the owner want to achieve in 3 to 5 years?

The vision should give an answer to the following question:



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“What would we like to see ourselves become?”

A **strategic theme** is a **priority area for activities of management**. **Strategic themes** should support the vision of the company coming true. BSR themes should be reflected under the perspective of supporting the strategic themes of the business.

Further on, the decision makers will have to reflect about the competences the organisation will have to develop in order to deliver on the mission and the vision.

The general competences have to be distinguished from the specific skills that are there.

Competences could be defined as the ability to develop specific skills and to work with them competently.

However not all of these competences (as those discussed in Ch. XXX) are equally important for every company. While a fully and comprehensively developed individual might be the ideal of an employee, in practice the hotel and restaurant will have to set priorities.

Setting business related priorities will help to use the hotel or restaurant´s resources in the most targeted way and thus save the business money.

In order to set priorities, however, there must be an analysis of the status quo. The company must reflect which competences are already there (and who “has” them) and which need to be acquired, either by learning of the employees or by looking for employees with these competencies.

In addition to that the hotel or restaurant will have to think about which of these competences are the most important and which are the most urgent to build.

This is not always the same. Some things need to be developed urgently, e.g. in order to address customer complaints which might lead to an immediate loss of business).



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Other competencies (e.g. foreign languages) are of a more strategic significance. They are crucial for that, but can be developed only in the mid and long term. Also here foreign languages are a good example.

Please **note** that there are several definitions for vision mission and strategic theme. So please avoid a discussion about the content of the words. It is more important that the hotel or restaurant decision makers reflect about what their mission vision and strategic themes can be. Experience shows that this step is in no way redundant, since the reflection in step 1 usually initialised a process of reflection that had time to unfold between the steps.

Therefore it is necessary to nail these thoughts down in the most clearly defined and precise formulations achievable.



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Exercise:

Discuss and Visualise

What is your hotel/restaurant mission?

Why are you in this business, what is the purpose and how in general do you want to be seen by your customers?

We are in this business because....

We will.....

Our customers see us as.....

What about your vision about your business – what is your main goal? Where do you want to be in 5 years?

In 2021 we will...



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What are the three most important things you have to do to support your vision coming true?

To support our vision the three most important things we have to do are...

- 1.
- 2.
- 3.

Note: It will take some effort to find a good formulation. Please take care to support this by visualising the attempts on flipchart. Document the final version by taking a picture.

Please discuss: what competences will you need to achieve these things?

For 1. we will need.....

For 2. we will need.....

For 3. we will need.....



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2.18: Setting Priorities for Development

In order to decide which priorities to address, a reflection of the most important and urgent competences that are necessary for achieving the vision is needed.

The result is a general orientation of the general fields of development.

Later on this has to be compared to the actual competencies of the employees

Exercise: What are the most important and what are the most urgent competences the employees of your hotel or restaurant need to support your vision coming true?

Order the competences according to the size of the gap you perceive between the competences needed and the actual competences!

+ IMPORTANCE -	1	2
	Make and implement development plan to maintain and utilise core strength	Act boldly, make and implement development plan plus emergency action

	<p>3</p> <p>Do something about it: Refocus business focus? Move to where competences are needed?</p>	<p>4</p> <p>Forget about it</p>
	<p>+ Level of Competence in hotel/restaurant -</p>	

Template: Competence Cards

Copy and cut, order on pinboard

Writing in own language	
Communication with customers in own language	Reading/understanding written instructions in own language
Talking to customers in foreign language	Writing in foreign language
Basic (calculating and checking bills, supplies etc.)	Advanced Calculating (Rule of three, creating Excel Sheets etc.)
Advanced computer use (installing programmes, Security, putting info online, producing complex documents	Basic computer use (reading, printing, E-Mail, retrieving information, input information to templates)
To have ambition and willingness to learn more	Methods of self-regulated learning (learning with colleagues, reading job-

To have the capacity to establish and follow learning objectives	General dexterity (ability to cope with new and unexpected situations)
General “soft skills” as good manners, ability to show a positive attitude	General “pro-active” attitude
Acting “entrepreneurial” i.e. treating every customer as if it was your own	Ability to interact with and address the needs of customers from different backgrounds

2.19 Competence Development Goals

Please mark clearly the result of fields 1, 2 and 3. Focus on maximum three competences development fields per field

Cut out these 3 most important and write onto a pinboard

What should the situation be concerning these competences in three years, in one year?

What could be the first step?

Activity	Who should have the competency?	What should the situation be in 3 years? General description in bullet	What should the situation be in 1 year? General description in bullet points	In which area/team/workplace are we excellent in this competence?	Which activity in our hotel/restaurant can build this competence?



		points			
A					
B					
C					
Et c.					



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2.20: How Managers can work with Individual Development

Plans:

Starting with a general reflection of individual employees competences and attitudes

2.20.1 Identifying the Overall Learning Priorities for Individuals

Rationale for Learning Needs Analysis

The main problems in tourism are very similar across countries: low pay, very high demand for staff flexibility and mobility, high staff turnover, high share of informal employment arrangements and persistent skill shortages. The sector also suffers from its highly seasonal character and is very vulnerable to external political and economic factors. Employment in such conditions is insecure. Over 95 % of companies employ fewer than 10 people (ETC, 2004). The specific nature of company size structure in tourism and the fact that the sector is practically non-unionised affect common HRD practices among tourism enterprises. The continuous complaint from employers in the sector regarding skill gaps and shortages curiously coincides with few training offers among tourism companies. At the same time, Employer recruitment practices often demonstrate a deliberate preference for un- or low qualified workers (normally cheaper) over qualified personnel.

In spite of the fact that many research activities into skills issues in tourism are taking place in Europe and worldwide, research in early identification of skill needs in the sector (i.e. with a longer-term perspective) are still exceptionally rare. This has several causes: persistent statistical gaps for this sector; domination of SMEs which



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are traditionally averse to research; very weak role of social partners, i.e. partners for discussion of research results and their transfer to practice. The numerous research activities are rather isolated, and hence offer limited impact and only partial transfer to policy and practice. The vulnerability of the sector makes it very difficult to cast any predictions and thus imposes additional problems for early identification of skill needs.

A learning needs analysis is a formal method of regularly examining the needs and requirements of staff. If organisations do not regularly invest in learning, they will not be reactive to change and competition.

This should be done regularly to avoid a 'knee-jerk' reaction to altering situations. A well conducted Learning Need Analysis will better ensure that the real needs of the organisation and individual are met, that specific targets are met. A Learning Needs Analysis will also allow organisations to plan the future skills of teams in relation to organisational goals and planned future change.

If training is targeted and individuals get the specific learning they need, the outcomes or returns will be better and participants will be more motivated. Each will know that they have been considered individually, rather than just as a number in a group and this will engender loyalty and motivation.

Data which influences the training decisions is available from a number of sources – both internal and external. To ensure that the right training is delivered to the right individual there must be enough data gathered as one-off may be as a result of a coincidence or anomaly rather than a genuine need.

If training recommendations are made on the basis of an opinion, rather than based on verifiable facts or figures, check to see they are justified. Sources such as activity logs ,appraisal documents, consultants, current employees, customer feedback forms, employee satisfaction surveys, focus groups, health and safety audits, interviews, management information systems, personal development plans, observation,



questionnaires, personal records, sales figures or training records are good sources of such information.

Team Occupational Needs

Learning is not just needed by individuals. Within a team there are needs which may be specific to that group of people. The ability to solve problems, communicate, make decisions and simply work together are all characteristics of productive teams and are skills that may need to be learned. The learning needs of teams may be better known to the team leaders and will need to be addressed on a collective basis. Team leaders may have responsibility for the training and development.

If learning activities will enhance achievement of organizational or team goals, then they must be considered. Checking if there is actually team work among the members or whether they are too independent, and if coaching would be as or more effective than actual training, should be done.

- Do the members of the teams understand their value in achieving goals?
- Does everyone clearly understand the expectations of them?

Organizations operate in a continually changing environment and it is essential that employees have the skills and behavior to address these issues.

Performance should be regularly assessed to determine what training and development are necessary.

Regular (quarterly, half-yearly, Yearly) appraisal interviews can be a good start, and should include on-going learning development plans, but there really needs to be more frequent checks made.

The development of individual learning plans for those for whom you have responsibility is a process that ensures inclusion of necessary skills and behaviours.

The Learning Needs Analysis is a good method for ensuring that all points are covered and needs met.



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A well-thought out and developed Learning Needs Analysis is a method for reducing the subjective elements of training decisions and focusing training more accurately.

To conduct such an analysis, the tasks of a job must be analyzed to identify the range of skills necessary for the employee to perform their jobs in the organization.

This may be done through a survey listing each skill and asking several questions about it. The questions will relate to a perceived need for learning in each skill and the perceived importance of the skills in the employees' jobs. The objective is to determine the learning needs and to be able to order those needs on the basis of importance.

A full discussion of methodologies of Learning needs analysis can be found in Ch. 2.24 of this guide.

We suggest to develop individual learning plans gradually, according to the following sequence:

- Definition of general competence needs of the hotel or restaurant (Step 1 – 2)
- Reflection of extra functional general competences and attitudes of employees (Step 2)
- Operational Learning needs analysis (level of individual skills and competences)
- Assessment of individual operational skills and competences
- Exploration of Learning opportunities in the hotel/restaurant (what can be learned where, from whom, when, how?)
- Definition of individual learning plans

After discussing the general competency needs of the hotel/restaurant the consultant should suggest to the decision makers to work with the matrix of assessment of general competences and attitudes to follow.

The consultant should explain the matrix and should discuss the criteria for each assessment with the owner/manager.



This exercise is valuable as it raises the awareness of main success factors in individual employees. The focus is on those factors which are critical for the learnability of the individual, i.e. the willingness and ability to be pro-active and learn more.

It looks at some general points.

The matrix can be supplemented with an assessment of those competences that are identified in the prior step as the strategically critical and therefore priority ones.

While at a later stage the matrix can be used to support appraisal discussions with employees, this should be done with some prudence.

At any time criticizing employees should be done only in the context of developing measures to correct behaviors, improve skills and competences or decide about other measures.

Without this connection to concrete measures appraisal discussions can be discouraging without initiating improvements.

At the same time appraisal of very good performance should be linked to discussion of how the excellence perceived can be used to bring other employees to the same standard.



2.20.2 Template: Assessment of Individual Extra Functional Competences

Hotel/Restaurant:

Date:

Employee:

Independence and interest towards work

<input type="checkbox"/> Very interested, improves his job continuously, independent and reliable.	<input type="checkbox"/> Showing interest towards work and strives to do it the best possible way. Mainly can do his tasks independently.	<input type="checkbox"/> Shows interest for work, it is necessary to periodically monitor and encourage	<input type="checkbox"/> Shows little interest towards work and should be frequently monitored and encouraged
<input type="checkbox"/> Professional behavior and appearance exceeds the expected standards and represents a model for other workers.	<input type="checkbox"/> Behavior and appearance fully satisfies expected standards of work, the manager need very rarely to correct him.	<input type="checkbox"/> Behavior and appearance are mainly with the expected standards of work but sometimes the manager need to correct him.	<input type="checkbox"/> Behavior and appearance are sometimes not in line with the standards of work, ignores the instructions of managers.
<input type="checkbox"/> Very flexible and regularly jumps in whenever necessary, eager to help in a variety of jobs.	<input type="checkbox"/> Regularly available when required, accepts schedules to different jobs.	<input type="checkbox"/> Ready to help co-workers if so requested from him, but mainly trying to stick to his job.	<input type="checkbox"/> Avoids to help others in their work or come to help out, stick's to his job.
<input type="checkbox"/> Exceeds the expected knowledge and skills needed to perform given tasks.	<input type="checkbox"/> Has all the necessary knowledge and skills to perform the given tasks.	<input type="checkbox"/> Have most of the knowledge and skills necessary to perform given tasks.	<input type="checkbox"/> Knowledge and skills are generally not sufficient to carry out given tasks.

Professionalism and work discipline

Flexibility and availability

Knowing the job

Working speed

<input type="checkbox"/> The tasks are often executed before the requested time.	<input type="checkbox"/> Tasks almost always executed in the required time.	<input type="checkbox"/> The tasks are often done in the required time.	<input type="checkbox"/> Tasks mainly not done in the required time.
--	---	---	--

Relationship with colleagues

<input type="checkbox"/> Maintains very good relationship and communication with all guests, guests like him.	<input type="checkbox"/> Refers attentive and friendly to all guests, cope well in most situations.	<input type="checkbox"/> Maintains mainly a good relationship with guests, but sometimes can't handle some situations.	<input type="checkbox"/> Avoids contact with guests, sometimes impolite to them.
<input type="checkbox"/> Actively contributes in creating a friendly working atmosphere, favoured as a collaborator.	<input type="checkbox"/> Supports a friendly working atmosphere, very good relations with colleagues.	<input type="checkbox"/> Does not distort the working atmosphere, maintains satisfactory relationships with colleagues.	<input type="checkbox"/> Undermines the work atmosphere, in a bad relationship with most of colleagues.

Relationship with guests

Priority field for hotel/restaurant development 1 (if not covered)

<input type="checkbox"/> Description of very good performance	<input type="checkbox"/> Description of good performance	<input type="checkbox"/> Description of performance that should be improved	<input type="checkbox"/> Description of unacceptable performance
---	--	---	--

development 2 (if not covered)

Priority field for hotel/restaurant

<input type="checkbox"/> Description of very good performance	<input type="checkbox"/> Description of good performance	<input type="checkbox"/> Description of performance that should be improved	<input type="checkbox"/> Description of unacceptable performance
---	--	---	--

development 3 (if not covered)

Priority field for hotel/restaurant

<input type="checkbox"/> Description of very good performance	<input type="checkbox"/> Description of good performance	<input type="checkbox"/> Description of performance that should be improved	<input type="checkbox"/> Description of unacceptable performance
---	--	---	--

Overall impression

<input type="checkbox"/> Stands out with his work in comparison with other workers, we definitely want to keep him.	<input type="checkbox"/> Successful at work as most other workers.	<input type="checkbox"/> Need to work on certain skills and behaviors.	<input type="checkbox"/> Not recommended for further cooperation.
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Evaluated

Confirmed



The information gathered through this appraisal will be useful for identifying priorities for development on an individual level.

Also the appraisal identifies excellent competences, which are resources to be used in the learning plans later on.

Example

Building Rapport	Duration: 30 minutes
Ask learners: How to build rapport with tourists?	Teaching and Learning Methods: Case Study, Q & A, Brainstorming, Discussion
<ul style="list-style-type: none">• Be friendly• Identify what guests want and need• Share stories and interesting information• Inform of services• Always smile and offer assistance• Resolve complaints quickly and in full:• Never ignore inquiries	Activity: List their answers on board or flip chart. Resources: Flipchart

Source: Local Guide Training Course

2.21 Step 3

2.21.1: Notes on Third Meeting Structure

This meeting has the aim to help the owner/ manager to reflect on the system used in the business for developing the key competences of the employees.

The results of the meeting:

- Facilitator and Client have reflected on the vision of excellence and learning
- Facilitator is using the LNA to help the client to plan the development of key competences
- Client has got new insights and inspiration by interacting with the external partner
- Client is using the LNA and plan the development of key competences with the employees

This workshop can be well prepared by the consultant/ facilitator because s/he has to present some theoretical background regarding the general model of LNA, methodologies of LNA in order to help the manager to make the best decisions.

2.21.2: Background: Methodologies of Workplace Learning

The chapter to follow is intended to give an overview of methodologies of workplace learning for the consultants, including references to additional sources.

The main focus of the process in this project is reflecting and expanding the current learning methodologies of the hotel/restaurant.

Often there can be found practices that work quite well.



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Also observing and reflecting practices of other hotels/restaurants (as well as other businesses) can help.

It depends on the skill of the consultant to suggest alternative/additional ways of learning in a way that these practices fit the individual hotel/restaurant and the individuals in the specific establishment will be willing and able to implement them.

The paragraphs to follow give some background information on methodologies of workplace learning. This information intends to support the facilitator in his or her dialogue with the partners from the companies. The material can be used in any format that is useful in the given context (presentation of main points in ppt, informal discussion, flip-chart).

Having in mind the arguments discussed before, is evident, that the selection of the learning methods must be closely linked to the learning objectives and with the learning content.

The learning objectives include not only the technical issues but also the so called key competencies or soft skills related with changing attitudes as well as personnel development of the learners.

Therefore a short background information on relevant learning methodologies might be a useful support for the facilitator of the TouriSME concept to help hotels and restaurants identifying appropriate learning pathways.

Most of the time the methodologies mentioned here will not be implemented by the hotels and restaurants 1:1, but they will rather be a inspiration in finding tailor-made, individual learning strategies for the.



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Example

The main benefits of workplace learning	Duration: 20 minutes Teaching and Learning Methods: Q & A, Brainstorming, Discussion Resources: Flipchart or presentation of main points in ppt
Ask learners: what are the main benefits of workplace learning?	
<ul style="list-style-type: none">• Motivation and loyalty• work productivity,• improvement of professional competencies• harmonization of employers needs to employees skills• increase work efficiency	

The different forms of learning at the workplace are related with the individual working processes and can be differentiated according to: the sequence, the rules or the procedures inherent in this process.

In the table it is possible to identify the correspondence between the learning orientation, the methods and the resources used. Provide some useful background knowledge to be able to facilitate such a discussion.

2.21.3 Overview: Job Training

Now a days training is the most important factor in the business world because training increases the efficiency and the effectiveness of both employees and the organization. The employee performance depends on various factors. But the most important factor of employee performance is training. Training is important to enhance the capabilities of employees (Khan et al., 2011).

The term "training" denotes investment in acquisition of skill or in improvement of worker productivity. The concept, therefore, includes schooling and training obtained on the job. The latter, under this definition, is a much broader concept than what is



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conveyed by the common usage of the word "on-the-job training." It includes formal and informal training programs in a job situation, as well as what is called "learning from experience." (Mincer, 1962).

An important prediction of basic human capital theory is that workers pay for all of their general and part of their specific on-the-job training in the form of a lower starting wage and realize a return to this investment in the form of higher wage growth over time (Barron et al. 1989).

Spinelli and Canavos (2000) concluded that employees felt satisfied if they were involved in decision making processes, gained appropriate job training and employee benefits, and had an effective manager. Also, Lam, Zhang, and Baum (2001) suggested that to increase job satisfaction, hotel managers should organize training workshops and development plans, particularly for new and highly-educated employees. Therefore, hotel managers can include tourism involvement assessments in the selection process. In addition, it may be useful to include the practice of tourism in management training. It is recommended to train hotel managers to be aware of the issue of managing an appropriate work-life balance. Hotels should also work to examine whether their managers and policies sufficiently encourage employees to get involved in tourism activities. Hotel firms can enhance employees' tourism perceptions by disseminating tourism information and benefits in internal meetings, seminars or training events. Training programs could be helpful for informing hotel managers about resources, such as participative management and team building, to enhance employees work engagement (Yeh, 2013).

Organizational training and development programs can enhance employees' learning and the "knowing how" competency (Sullivan et al., 1998). As employees are eager to be educated and empowered with further training (Kong and Baum, 2006), it is critical for hotels to offer a variety of training programs in addition to pre-job and on-the-job training (Kong et al. 2012). The organizational performance depends on the employee performance because human resource capital of organization plays an



important role in the growth and the organizational performance. So to improve the organizational performance and the employee performance, training is given to the employee of the organization (Khan et al. 2011).

Training is provided within a training program. In an organization, needs assessments are conducted to analyze problem areas and to identify potential solution strategies. If the identified need is training, then a training program is developed, which begins with recognition of training needs and methods, leads to training, and subsequently, evaluation (to examine the extent to which the identified needs are met and the problems are resolved).

Example for underline the importance of job training:

The Buccleuch Arms, located in Moffat, Scotland, is an independent family-run 14-room hotel with 24 employees. Staff training is central to the success of the hotel, and getting employees on board with a new "learning culture", one that gave employees faith in the management's commitment to their long-term well-being and development, was a challenge.

Staff learning and development at the hotel focuses on three areas: (1) individuals and their own aspirations for the future; (2) the departmental needs within the hotel, and how to make employees excellent at their specific functions, including customer relations 'soft skills'; and (3) the corporate need of the business to provide a distinctively excellent experience to guests.

Staff views on their personal development needs are solicited by management, who then contact local learning and business support agencies for external courses and programs of study. Training for "soft skills" begins with the hiring process, which focuses exclusively on an applicant's willingness to study and be trained. Soft skills training is also done by the General Manager, who gives constant customer-relations instruction in areas like greetings, energy, enthusiasm, conversational interaction and



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eye contact. In the restaurant all wait-staff are shown not just the prepared dishes on new seasonal menus but also the raw ingredients, in order for them to be able to tell guests fully about the offerings and understand the quality of the dishes served.

Three to four times a year, the hotel closes for a day in order to bring in external consultants to train all staff in customer care. It is here where suppliers are asked to train staff on their products. Outside experts are also brought in for wine education, and staff are sent on industry courses for specialized needs such as bartending.

The outcomes speak for themselves: there have been vast gains in the quality of hotel service and the “ownership” that employees show in their work and in the hotel operations (the hotel now has a national reputation for its service and food); there is a waiting list of employee applicants; and total sales have increased by 105 per cent in the first year of operation under the new learning initiatives (with dinner covers increasing by 81 per cent and wine sales increasing by 512 per cent).

Organizational Learning Process

Huber (1991) has announced organizational learning of process as follows (Dikmen, 1999):

1. Knowledge Acquisition

- Benchmarking: Benefit from the experience of other companies by comparison.
- Congenital knowledge: This kind of information they bring to the business of working experience, behavior, know-how and skills are.
- Experiential learning: to try alternative modes of movement, testing, feedback from inside and outside the company, the experience of the



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organization, training of individuals, non-systematic learning, contain or to learn through trial and error.

- Vicarious learning: Learning from the experiences of others.

2. Information Distribution: The available information is very important how to share in the company. Distribution of information will allow the emergence of new knowledge and the acquisition of new behaviors.

3. Interpretation of Information: By the same meaning all available information is correct and will give the organization members should be interpreted broadly

4. Organizational Memory: Storing information for future use constitutes the memory of the organization.

Core training methods is identified in the below. These methods constitute an exhaustive list of training methods and that any training methods not included on the list are mere extensions or subcategories. This is an overview of these training methods. For each method, provided a definition, examples of its use (as reported in the literature), and literature references that were used to help us define and provide an example of that particular method (Martin et al., 2014):

- **Case study:** Provides the participants an opportunity to develop skills by presenting a problem, without a solution, for them to solve, or with a solution, as an exemplar of how to solve it.

Example: Used in training law students, where students learn about past legal cases and the judicial decisions that resulted (with a solution). A bank administration course has students select a bank from a list, then they are given a hypothetical situation and are asked to apply their financial analysis to the situation (without a solution) (Bruner, Gup, Nunnally, & Pettit, 1999; Elam & Spotts, 2004; MenkelMeadow, 2000).



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In hotel industry, experienced with customers and employees or technical problems and how to solve it. For example, leaving the job of department manager in high season, drunk or problematic clients in lobby, the conflict between employees, theft in rooms etc.

Example

Solving Problem Ability	Duration: 30 minutes
Provides the participants an opportunity to develop skills by presenting a problem, without a solution, for them to solve, or with a solution, as an exemplar of how to solve it.	Teaching and Learning Methods: Case Study, Q & A, Brainstorming, Discussion
Ask learners: How would you solve these problems?	Resources: Flipchart or presentation of main points in ppt
<ul style="list-style-type: none"> • leaving the job of department manager in high season, • drunk or problematic clients in lobby, • the conflict between employees, • theft in rooms etc. 	

- **Games-based training:** Trainees compete in a series of decision-making tasks which allows them to explore a variety of strategic alternatives and experience the consequences which affect the other players, but without risk to the individuals or the organization.

Example: The hit American reality TV show The Apprentice has contestants work in teams that compete against one another in business-related tasks and each week a contestant is "fired," leaving only one winner at the end (Brown, 2004; Gentry, 1990) Participants are divided into two separate teams. One of the teams, "demand team" and asks difficult and complex demands like a customer from other team, which is



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generating fulfilling requests and solutions to the customer. In this way solutions can be demonstrated against different customer expectations. This is an important and helpful brain storming method that each employee will be informed about the problems and solutions related to their department or different departments.

Example

Demand and Answers	Duration: 40 minutes
Ask learners: What can be difficult demands from customers? And how can be solved these demands?	Teaching and Learning Methods: Case Study, Q & A, Brainstorming, Discussion
<ul style="list-style-type: none"> • Small bed • Tasteless meals • Noise • Dirt in the cups • Trash on the beach • Customers who molestation • Fighting couple in the next room • Some technical problems etc. 	Resources: Flipchart or presentation of main points in ppt

- **Internship:** Involves supervised, practical training while on the job where the trainee is permitted to work in the position for which they are training, but with some restrictions and with substantially less pay or no pay.

Example: The successful completion of a 1-year internship is required of all clinical and counseling psychology students in the United States; this internship is supervised by an experienced psychologist and is overseen by the Association of Psychology Postdoctoral and Internship (Ballard & Carroll, 2005; Stedman, 1997).

Internship is very important in the tourism industry. Internship, enables the tourism students to practice in the industry. And also, internship provides cheap labor to the



hotels. But especially, rotation in the internship training is very important in terms of the experience of the different departments.

- **Job rotation:** Involves training for a job by working in the job for a limited duration, while still maintaining the original job.

Example: At Ingram Micro. participating employees rotate their jobs between five different process areas so that at the end of the program they can perform in all of the company's five distribution centers (Barbian, 2002; Ho, Chang, Shih, & Liang, 2009; Wilson, 2000).

In hotels, rotation is limited because of the service quality and specializing. But it can be used for the lower level employees. On the other hand, job rotation is important for the development of the employees. Because, the hotel establishments has a complex structure and manager or future managers must know every department and at every level jobs. In this context, hotel managers are able to provide the knowledge and skills acquisition for the rotation of the eligible employees. For example, a waiter working in the buffet restaurant, next month, working in the fish restaurant, or a cooker working in the cold kitchen , shifting to the breakfast section; a barmen working in the pool bar, shifting to the roof bar etc.

- **Job shadowing:** Involves a trainee closely observing someone perform a specific job in the natural job environment for the purpose of witnessing first-hand the details of the job.

Job shadowing (or work shadowing) is a popular on-the-job learning, career development, and leadership development intervention. Essentially, job shadowing involves working with another employee who might have a different job in hand, might have something to teach, or can help the person shadowing him or her to learn new aspects related to the job, organization, certain behaviors or competencies.



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Organizations have been using this as a very effective tool for learning. Some of the applications of job shadowing are the following (wikipedia.org):

New job training: Consider an individual planning to take up a different role in the same organization. The individual may be asked to shadow the current incumbent for a couple of days to months to get a better idea of his or her role, as well as understand the particulars of the same without the commitment of the responsibility. This helps the individual to be more confident, aware, and also better prepared to take up the role. For the organization it reduces the chances of failure and reduces the time required for the individual to be fully productive.

Career development: With multiple options available for somebody to grow in an organization, job shadowing can help to get a better sense of options available and the required competencies for the same. An employee may shadow senior employees in various positions/functions to appreciate and get a better idea about what it takes to build a career there.

Developing expertise: At the core of job shadowing is its ability to transmit knowledge and expertise to another person. By doing a planned work, job shadowing can support knowledge management and ensuring that deep expertise and knowledge are not lost.

Leadership development: Many organizations use job shadowing as an effective tool for leadership development. Aspiring leaders are given opportunities to shadow senior leaders and learn from them. It effectively complements classroom learning and aspiring leaders get to experience first hand what it takes to be a leader.



Example: Choice Hotels International in Silver Spring, Maryland, USA, offers staff at all levels the opportunity to job shadow for a day in one of their franchised hotels to experience what it is like to be a hotel operator (Tyler, 2008).

- **Lecture:** Involves the dissemination of training material by a trainer to a group of trainees, by means of verbal instruction.

Example: The Interactive E-classroom allows students to watch and listen to the lecture presented by the course instructor, while automatically being shown the corresponding slides and/ or lecture notes on a single web interface (Zhang, Zhao, Zhou, & Nunamaker, 2004).

- **Mentoring and apprenticeship:** Involves a one-on-one partnership between a novice employee with a senior employee. Mentorship aims to provide support and guidance to less experienced employees whereas apprenticeship is for the development of job skills.

Example: The Organizational Development & Learning Centre at the University of Toronto offers mentoring programs of a 12-month duration, which partner staff with more senior university leaders to assist them in enhancing their job skills and their university experience (Andrews & Chilton, 2000; <http://www.odlc.utoronto.ca/mentoring>).

- **Programmed instruction:** Involves the delivery of training through instruction that is delivered by a program via some electronic device without the presence of an instructor; the electronic device can be a computer, DVD player, CD player, etc.

Example: In pronunciation training using a computer program with a built-in automatic speech recognition component, provides automatic feedback to trainees at the word and sentence level (Gist, Rosen, & Schwoerer, 2006; Neri, Mich, Gerosa, & Giuliani, 2008; Russ-Eft, 2002).

- **Role-modeling:** Involves the live presentation of skill(s) to an audience of trainees.



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Example: A Wheelchair Skills Training Program developed to train users of manual wheelchairs to attain the important but dangerous and difficult skill of curb climbing (Kirby, Bennett, Smith, Parker, & Thompson, 2008; Verma & Singh, 2010; Wang & Hsu, 2008).

- **Role play:** Requires trainees to assume a character and act out the role in a make-believe scenario or series of scenarios; learning comes by way of reflection on the play.

Example: Reference assistants training at a library, has the trainees play out scenarios which are then followed by a trainer-led discussion (Sheets, 1998).

- **Stimulus-based training** Using some type of stimulus (i.e., music, works of art, narratives, etc.) to motivate the learner to learn. The training induces a state of being (e.g., relaxation or awareness) in the participants to achieve learning. The use of music to eliminate or lessen failure cues and to induce a state of relaxation or success cues in students to promote learning of mathematics (Lam, Kolomitro, & Alamparambil, 2011; Kumagai, 2008; Zemke, 1995).
- **Team-training:** Intended exclusively for groups of individuals that behave interactively, to either improve mutual knowledge within a team or to train the team on a team specific skill.

Example: An exercise which has each team member write opinions to a prompt question, then come to team consensus (Wheelan, 2005; Craig, 1996).

In order to increase the interaction of the employees will be asked to prepare a newspaper headline about the hotel and asked to discuss what could be done emphasis on the most powerful features of hotel. In this way, employees are provided with common reach consensus. This application is intended to develop the awareness of employees and creativity.



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2.22 Operational Methodologies of Workplace Learning

Below some forms of workplace learning are discussed which are widely used in production and service companies, but which are also useful in hotels and restaurants. It has to be pointed out, that also when a hotel or restaurant delegates an employee to an external training course, it should expect to use many of these methodologies to make the best use of the newly acquired knowledge in the actual workplace.

While courses can be useful to learn knowledge and skills in compact way, almost never the content can be transferred to the workplace 1:1. An active process of adaptation is needed. Also the hotel or restaurant has to make sure that the new knowledge is actively used, otherwise it will be forgotten very quickly.

Also for this “transfer” purpose the methodologies described below can be useful.

Traditional methods of instruction at the workplace Action oriented In-company learning	<ul style="list-style-type: none">• Learning by doing• 4 Steps Method• Analytic Instruction• Learning projects• “Leittext” Method “(Guidance scripts methodology)• Learning field approach• Learning Islands
Decentralized and group oriented vocational training	<ul style="list-style-type: none">• Quality Circles• Learnshop• Investigation and Presentation• Job Rotation
Individual vocational training integrated at the workplace	<ul style="list-style-type: none">• Acquaintance to work• Training at the workplace



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	<ul style="list-style-type: none"> • Self-qualification at the workplace, • Computer based learning
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Traditional Methods

These are mostly used in initial vocational training, especially in the smaller hotels and restaurants.

a) Learning by Doing

In its simplest form the employee is just confronted with a new task and challenged to figure out how to do it and learn from mistakes. More often the learner is placed near another professional. This "model" worker shows what he or she does with some explanations as the senior considers necessary. The learner mimics the model worker as closely as possible.

This form of learning can be quite powerful, if the more experienced colleague works well. If not, then there is the danger that also bad habits and less than optimal ways of working are transferred to the learner.

Therefore this form of learning should only be used in hotels and restaurants when there is a regular review of the actual practices and a monitoring of these practices.

If reviewed regularly including setting learning targets and reviewing results this can be the most effective way of learning in many cases.

b) 4 Steps Method

This is a more systematic and elaborated version of a). It comprises four formal steps:

- Preparation: motivating the learner and introducing the topic
- Demonstration: Demonstrating the correct execution of the task.
- Imitation: Execution of the task by the learner



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- Practice: Practicing to the adequate level of competency with diminishing supervision.

This methodology can be useful also in hotels and restaurants.

It is more analytic than pure imitation, as it necessitates to not only demonstrate but also to explain the work process step by step. This requires an amount of thinking also on the side of the “instructor”.

Often this leads to ideas for the improvement of the work process. Also questions from the learner stimulate such thinking.

Also the method stimulates different ways of learning. In addition to imitating instinctively also analytical abilities are used. Having to explain the work means that it has to be fully understood.

c) Analytic Instruction

This method is again a further development of the methods mentioned. The task is analyzed in detail and thoroughly explained, often supported by written material or other media.

Action Learning

Here the aim is to promote the autonomy and the self activity of the learner.

a) Project Method

The project method is widely used, some times even unconsciously, because it is regarded as team problem solving rather than team learning.

A task or a problem from the real working practice is analyzed and solved by a project team.

For example, if a restaurant wants to become more attractive to vegan customers there are a number of things to be learned: exploring vegans' needs and preferences, marketing to vegans, learning to cook appropriate vegan dishes etc.. Many employees



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are involved, information needs to be obtained, experiments have to be made, activities synchronised etc.

Therefore in addition to the respective skills themselves also general competences as information management, team organisation, communication etc are built.

As a learning method sometimes a project is set up that simulates a problem similar to one that might come up in the real working process. When used as a learning method the set up of the process will emphasize a thorough analysis of the problem and the solution as well as the documentation of the process and the identification of general lessons learned from the project.

b) Guiding Scripts Method

This method aims essentially on creating an orientation for the self-learning process which happens especially in the project learning method.

Its focus is the development of tools and instruments which can support the self-learning process. Guiding questions are the main way to inspire self learning.

A guiding script usually consists of guiding questions, a working plan, a evaluation worksheet and a guiding head note.

The method is based on the model of a complete work process, comprising of the steps:

- To inform: The guiding questions must inspire information about the tasks and knowledge and resources to master the task;
- To plan: The learner must develop a written working plan;
- To decide: decision on the work-process to implement, often in dialogue with an instructor/master worker;
- To implement: implementation of the work-plan by the learner/trainee;
- To control: self-control process supported by guiding questions as an instrument;
- To evaluate: dialogue with instructor on results method and lessons learned.



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This method based on the individualized learning enables the individualization of the learning processes at the workplace. This flexibility and self direction are crucial conditions for the integration of learning and working processes. It is critiqued for not referring to the integrated work-process. As a consequence the concept of learning fields has been developed.

Sometimes the methodology is also calls "learning and working assignment method". One main opportunity for hotels and restaurants resulting from using this method is that step by step a full documentation of all relevant work processes is created in the form of the guiding scripts.

This facilitates the further training of employees and is at the same time a form of quality assurance, as the guides are reviewed regularly and represent the standard to which the hotel or restaurant works.

Decentralized and Group Oriented Vocational Training in Tourism

While in the methods described in the last paragraph the focus and the occasion of learning was clearly individual instruction, in this paragraph methods will be described, which will yield big learning results, but whose aim is primarily problem solving, process innovation and improvement and/or the collective learning in the group. Therefore not only the individual employee of the hotel or restaurant gains from using the method, but the whole business takes the instruction of learners as an opportunity to improve its own processes. Vice versa, learning is not regarded as a singular event, but is incorporated in the company culture as a whole. Using these methods can be a way to create a "Learning Restaurant/Hotel".

a) Quality Circles



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Quality Circles (jap. Jishu Kanri) are workgroups of some employees who have the aim to utilize the knowledge and experience of employees for improving processes. This usually also improves the competencies of the employees as well as the working climate. Quality circles usually consist of 3-10 employees who meet each 2-3 weeks for 1-2 hours, often facilitated by a colleague trained as a facilitator. The QC analyses problems of their field of work, often using creativity and problem solving methodologies.

The QC is also responsible for implementing and monitoring the solutions identified. Sometimes employees from different hierarchical positions are involved.

b) Job-Rotation/Hospitation (job shadowing)

Job Rotation programs organize the rotation of individual employees through the different workplaces, in order to achieve more flexibility inside the hotel/restaurant by making employees multifunctional to certain degree and by developing the general understanding of the work-flow. While JR aims at acquiring the skill to do the job hospitation is presence at the other workplace including shadowing the worker there. It will result in an understanding of the tasks and duties of the position.

In the case of continuing vocational training JR and Hospitation is useful in strengthening co-operation and team work because it allows each worker/employee to know more about the tasks and expectations of other employees. This helps to prevent frictions at interfaces between different functional units (e.g. room making vs. customer reception). Exploration of other areas of work is often supported by a list of guiding questions.

Individual Vocational Training Integrated at the Workplace (use of Conventional Resources and Methods)



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Within this method of vocational training the learning process is not separate from the workplace neither in terms of space nor in terms of time. This is the meaning of integrated learning at the workplace.

The big difference in relation to the other learning forms mentioned before is the fact that in this case learning is an individual and continuing process happening in each worker's workplace.

In most of the other learning methods the group/team was playing an important role. To use these methods successfully, it is necessary to provide some previous conditions:

The workplace must be related to a working process that can be interrupted for learning without creating disturbances in other workers tasks.

Also learning resources (Books, CBT and communication possibilities to tutors or trainers) must be provided.

a) Acquaintance to the Workplace (breaking in)

This means introduction to a certain task or duty by informal supervision by colleagues, supervisors or more experienced workers.

b) Training at the Workplace

The process is based on the acquisition of knowledge and experience by performing the job under the continuing support of a trainer, who, normally, is also a very experienced worker on that job. The support is formally arranged.

c) Self- Learning at the working place

This general term refers to all activities of an individual employee to learn his or her tasks and duties and to expand skills and knowledge. Self-learning at the workplace requires an adequate design of the work, like some latitude in disposal of the time, resources like media, guidelines on expected results, availability of feedback from superiors and colleagues. Usually it is useful to define learning targets and to set up a plan for the learning process. It can also be useful to reflect with a partner experienced in the field of expertise about the issues dealt with, insights and lessons



learned. This will help the learning individual to appreciate its own progress. Use of learning methodologies and media can be fully determined by the learners' personal learning style and preferences.

Individual vocational Training Integrated at the Workplace (use of New Technologies Based Methods)

WBT - Web based training

A lot of content relevant for tourism can be found on the web. Many learners will use that spontaneously, but the hotel or restaurant should find ways of sharing content it regards as useful with its employees.

Also it can consider to produce own content, as instructional videos about relevant work processes.

Producing such videos is often inspiring for the learners and necessitates a thorough understanding and practicing of the task. It also builds the competence to verbalise work processes, a competence required in many examinations in Tourism as well as in the regular peer coaching processes that take place on a daily basis.

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2.23. General Model of Facilitated Learning at the Workplace

This chapter gives some background information on a general methodology of workplace learning as developed in the German Ministry of Science and Education Pilot Project "FILIP" in cooperation of ISOB GmbH and f-bb, research department of a major German Training Provider. It has been tested with 6 SME from different sectors and is now widely used in consulting SME in Bavaria on training issues.

This information intends to support the facilitator in his or her dialogue with the partners from the companies in Tourism. The material can be used in any format that is useful in the given context (presentation of main points in ppt, informal discussion, flip-chart).

The process described is one of the sources for the design of the consulting process described in this guideline and can be adapted and changed according to the actual needs of the concrete hotel or restaurant and/or the owners and employees in it.

The reason to discuss this general methodology in contrast to the more detailed description of a potential sequence of consulting given in this guideline is exactly to inspire such adaptation and flexibility.

It has proved very valuable, however, to mind the different steps of the process. It will be the task of the facilitator to motivate the partners in the company to complete the process up to the point of a regular review of the learning progress.

Methodologies of Learning in the Workplace and General Model of Facilitated Learning

What are the implications from the tendencies described in Ch. 2.8 for the qualification needs of TouriSME? Employees today as a consequence of developments that could be described only very briefly in this context, need not only more but also completely new skills, qualifications and competences. Of course the technical skills of



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the respective professions in Tourism and concrete working tasks have to be mastered to an ever increasing degree.

Social skills, an understanding of the workflow of the services provided are now increasingly relevant.

These broader competencies also have to be adapted to the changing work-process on a continuing basis. Often the broader competences themselves can be an enabler and positive factor of innovation and improvement. Therefore all learning in the TouriSME has also to contribute to building the general Key Competences for Life Long Learning. TouriSME therefore need strategies of competence development that take care of those needs. Research in the context of initiatives like the German BMBF Model initiative "FILIP"²², for the service Industry (Leonardo da Vinci Project "Compserve") or in the Tourism Industry (HOTSME) demonstrated that the "teaching" of individual skills alone is not enough.

Much more qualification strategies are needed that improve the understanding of the working process as a whole.

If employees are asked to use their potential to flexibly adapt to the working process and to contribute to the improvement of the production process they need knowledge about the process of service provision and an improved insight into the relevance of their contribution to this process as well as into the degree of their latitude.

The learning methodologies must adapt to the learning needs deducted from the process of service production and the general strategy and vision of the individual hotel or restaurant.

Most often this means "learning" must move out of the classroom and into the workplace.

Rather than sending employees to "school" (or a training provider) the workplace itself must be made conducive to learning.

²² <http://www.filip-toolbox.de>



Employees need to learn new sequences of work as fast as possible and to increase their flexibility by widening the range of work they can do. Flexibility and ability to learn are a new key competence.

Also engaging employees more in learning in the actual workplace can be motivating and give employees a sense of purpose. It can inspire the entrepreneurial talents and improve the identification with the work.

Therefore the learning needs identified in the initial research in TouriSME are addressed by these forms of learning.

Training at the beginning of the professional life (formal apprenticeship, learning in a professional school, initial training on the workplace) therefore must be complemented by lifelong learning, partly by traditional methods but much more by non-formal and informal ways of learning in the workplace.

The aim must be to analyse learning needs, to identify adequate opportunities to learn and to define learning arrangements and learning pathways to meet these learning needs.

With this integration of learning into the work process new ways of dealing with the qualification process become relevant. Not teachers in the classroom will be the relevant actors of the future of learning.

Learning cannot be delegated to a training provider (internal or external). Much more the learning needs must be analysed at the workplace and learning will take place mostly on the workplace. As a consequence new actors become relevant:

The most important are the persons who are responsible for the work process (master employees (those with a lot of experience, outstanding performance and/or a high Tourism specific formal qualification), managers, owners. They must take responsibility for the learning of the employee group.

Managers must become coaches and supporters of the learning of their employees.

Training facilitators can support them in this by providing settings and methodologies.



As in big Tourism chain hotels and restaurants also in small TouriSME leaning does not come about spontaneously. It has to be organised. Learning of individuals, groups and teams needs a structure and adequate competences of facilitation.

Owners and managers, supported by facilitators are in the focus. They must lead the process and address questions like:

- Identification and assessment of learning needs: Who must learn what?
- Organising learning: Where and how can be learned? From whom can be learned what?
- Evaluating learning: What was the result of the learning? What was the benefit?

In order to cope with these new duties managers need to acquire new competencies like analysing production or service processes under the perspective of learning opportunities, matching the companies competencies needs with the competency profiles of actual and potential employees, organising work integrated learning on site. Also these competencies can be acquired in the work process. To make this learning efficient it proved beneficial to be coached and supported by a internal or external facilitator with experience and methodological knowledge.

In the FILIP model of supporting workplace learning the following principles of supporting managers in organising learning were followed:

The manager develops and implements company specific practices of learning and (self)coaching for his field of responsibility (production, employees). These practices and methodologies are used also in continuingly developing and improving his/her own competencies in the field. He/she consults and coaches employees in learning their duties and tasks, provides and protects learning resources (time, access to information) and facilitates the cooperation of employees among themselves and with external trainers/expert where needed.

External facilitation does not prescribe a fixed method or strategy. The focus is on the tailored development of learning practices that are adequate for the respective context and individuals learning needs and learning styles.



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Facilitators provide opportunities for reflecting and structuring the process and information on established as well as innovative methodologies and best practices of learning. Facilitation of learning in the “FILIP model” is organized in three steps:

Basic Model of Learning in the business

Learning needs analysis

Finding subject areas

Initialising, facilitating and arranging learning activities

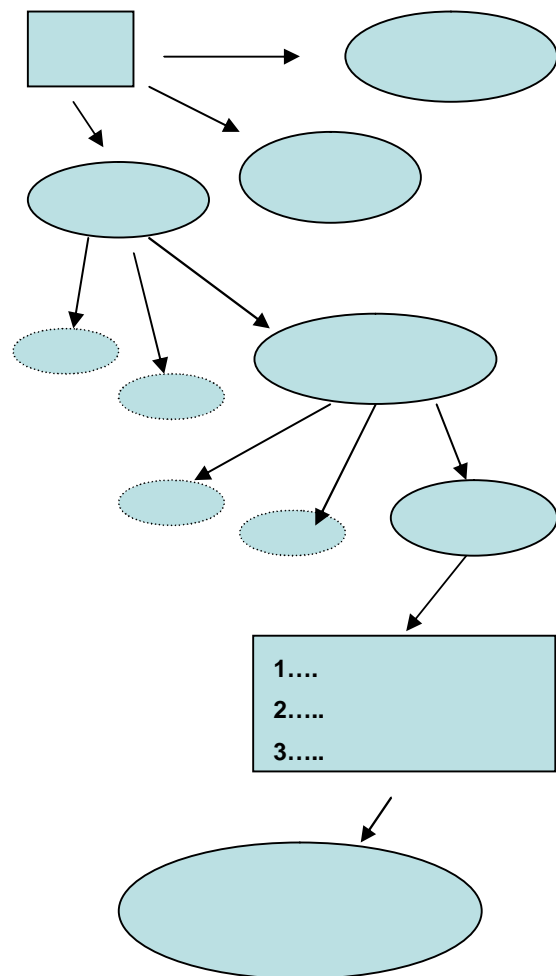
Defining areas of activity

Stipulating aims of activities

Designing and scheduling activities

Evaluating learning

Evaluation



Step 1: Assessment of the Situation within the Company



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Part of this is covered by the general interviewing in the context of SOCIALSME.

The identification of training and learning needs in SME is often neglected and/or unsystematic. A systematic and targeted identification of competency needs and a matching with the competency profiles of actual or potential employees is often rare and limited to immediate problems. To keep companies sustainable and employees employable also the trends of qualification needs must be analysed. Often managers are overwhelmed by their day to day duties. Facilitation and a mutually agreed realistic framework provided by external facilitation can be a big support for managers to take care of this issue. Document 63320 provides methodological background for such a framework.

Step 2: Learning Needs Analysis / Definition of Fields of Activity/Learning

Among the methods of defining fields of learning the decision by the manager is still the most usual. Cooperative methods, the discussion with employees and using their potential as experts of their own workplace can lead to more productive results however! This often seems to be too resource intensive but with support of external facilitators often a good result can be achieved in reasonable time.

Step 3: Initialising/Facilitating and Arranging Learning Activities -

Accompanying the Project Work in the Company:

The manager monitors and coaches the learning process. If needed support by the facilitator can be beneficial. Often a short common reflection via phone or mail can help to overcome obstacles. Facilitators can provide information about methodologies like the ones mentioned above. Most important scheduled workshops provide a structure and time-frame for the planning of the learning process. Facilitation methods are demonstrated and the expert knowledge of managers and employees is visualised and guided towards clear training pathways and decisions.



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Step 4 Evaluating Learning

All learning processes that had been decided upon should be monitored and evaluated at defined points of time.

Methods used can range from a simple common reflection to quite complex calculations of the return on investment.²³

Components of Successful Coaching of Learning Projects

In the context of the implementation of FILIP the following central elements have been identified as supportive for the coaching of learning in SME:

- Processing of a real qualification problem in the work situation
- Forming of a project group in the SME to organize the learning
- Regular, scheduled reflective discussions
- Planning of the learning process
- Including employees in analysis, decision making, implementation and evaluation
- Coaching of the learning process by the manager
- Defining agreed learning aims
- Regular evaluation of the state of learning

These components should be explained a bit:

Processing of a real qualification problem in the work situation:

The learning problem to be processed should be a real problem of the working process in contrast to an abstract exercise. By dealing with the problem managers and employees gradually acquire the methodological know-how to deal with learning problems in the company more and more by their own. The company gradually builds up a learning system and becomes a socially responsible “learning organization”.

Forming a project group:

²³ Like developed in the project “Return on investment in training” <http://www.srep.ro:800/roi2/>



After the problem or learning opportunity is identified a project group of all employees and managers concerned should be formed. All persons who have responsibilities in the area should be involved by keeping them informed, seeking their input or involving them in the activities. This way obstacles from distrust can be overcome and the activities will be more readily accepted. In addition to employees, managers and facilitators/experts also workers representatives should be involved, at least by keeping them informed and by seeking their support.

Regular reflexion:

Learning in TouriSME competes for resources and attention with the demands of the day to day work process. Often the importance of learning is accepted while there are always more pressing needs. The downside of this fact is that this way the most important things will never be actually done. Therefore there must be a binding framework and schedule also for important activities, among them learning activities and other socially responsible activities. One way to make sure such a structure is maintained are regular reflective meetings that can be very short but must be binding. Occasions can be agreed milestones of activities. Often the exposure of the activities to an external facilitator helps to „do the homework“ and increases the discipline in implementing scheduled activities. In this sense the involvement of external partners helps to defend learning against the pressure of the daily routines. This is often regarded as a short term burden, but this burden is in fact a benefit in the long term as necessary and important activities actually get implemented.

Planning of learning in the business:

Learning often needs some changes of the work routine. It is important that this rearrangement is not a negative influence of the work performance. Facilitation can help managers to design learning pathways that will interfere with the productivity as little as possible. This is mostly a question of good planning and coordination. Therefore a facilitated planning of learning also here is the key to success. Issues to



address are time and place of learning, learning partners and picking up learning opportunities in the work process itself in a flexible manner.

Involving employees

Employees often are the experts of their work process. Therefore it would be a waste of resources and motivation if they are not involved in the planning and implementation of learning. Respecting employees not only as learners but also as experts who can contribute their knowledge to the process is a key to motivation. Experiencing learning as a way to improve the working process and making workflow smoother and better will overcome barriers to learning like fear of formal classroom style learning setting that often remind of unhappy school experiences. In contrast to that “the learner knows everything, the learner knows nothing” situations in our experience learning as a professional exchange among experts is readily accepted and welcomed also by employees who are sceptical against (formal) “learning”.

Owners and Managers as learning coaches

Among the most important factors of success is the continuing support and monitoring of the agreed learning project by the responsible managers. The learning employees must be sure of the consistent support of their superiors in all phases of learning and implementation of learning in practice.

Agreeing on concrete aims and measures:

No meeting or conversation in the context of the learning process should end without agreeing on binding next aims and steps of action until the next meeting. These agreements should be monitored in the next meeting. Getting used to this self-discipline in our experience is a key factor in growing trust that work is spread equally and fair and nobody has to work in vain due to bad coordination and misunderstandings.

Evaluation of experiences:

The final evaluation of learning achievements can start with a feedback from the actual participants and their responsible managers. A more in depth monitoring could



seek to identify the real increase in competences and productivity. Adequate ways to monitor this should be defined right from the beginning. This should be an integrated part of the process planning. In addition to that in our experience it is also useful to ask participants and stakeholders of the learning project (internal and external customers and others) for additional observations and unexpected consequences. Often these “unintended benefits” are at least of equal importance.

The Manager as a Coach

As it is not usual that SME either do not train their employees at all or try to delegate this task to training providers, some short remarks on the manager as a coach of his employees might be useful. These remarks reflect insights from the pilot projects “Learn&Work” and “FILIP”.

Owners in small and managers in mid-sized TouriSME are key persons for the learning of employees in TouriSME. They can play an important role in linking informal and formal learning. Life Long Learning for most employees in SME still means mostly informal learning in the work process.

Formal learning is the exception.

The necessity of learning is hard to deny. Obviously the implementation is the main problem. One of the reasons is a lack of systematic efforts in organizing learning and integrating informal and formal learning. One of the reasons is that up to now the discussion focused mostly on training providers and sometimes personnel management in companies. This means that those who are responsible for the real day to day design of the work-process and the design of the duties and tasks of the employees have been left out of the discussion. They are the immediate supervisors of their employees. Therefore they are also the key persons who decide on their employees learning opportunities.



Up to now this responsibility is not adequately perceived and executed. Two reasons stand out.

On the one hand owners and managers have not always integrated the design of learning pathways into their professional self-perception. Learning often is perceived as classroom learning only and therefore not seen as their responsibility, ignoring the learning that in fact takes place at the workplace.

This learning at the workplace is regarded not as learning but as working. As a consequence it is not designed to optimize the learning results.

A third factor is that owners and managers often lack adequate pedagogical knowledge to identify learning processes and how to utilize them the best for the productivity of the work.

Acquiring the ability to systematically develop the skills and qualifications of their staff by using the learning opportunities at the workplace must therefore be a priority for middle managers.

Work integrated learning is learned best by learning in the work-process. In the beginning this can and should be supported by an experienced facilitator who provides access to methodologies (tools, worksheets) and opportunities to reflect the managers own insights plans and aims. During the process the manager will be more and more capable to finding his or her own style and repertoire of learning, finally building a specific "learning system" for his or her field of responsibility.

This will be done most efficiently if the planning of the learning at the workplace always not only includes learning aims for the employees, but also learning aims for the managers. These aims are mostly aims of acquiring methodological competence of organizing learning.²⁴

²⁴ Cf.: Krauß, Alexander; Mohr, Barbara: Vorgesetzte werden zu Gestaltern und Förderern informeller und non-formaler Lernprozesse im Betrieb“ GdWZ 2/2005, p. 26-28



2.24 : Analysing Current Learning Practices in the TouriSME

As probably already discussed in the initial interview, a review of the current training practices in the hotel or restaurant should raise the awareness of the learning opportunities that are already there and can potentially be expanded or improved.

Exercise:

Collection of learning opportunities and ways of learning in the company

How do we and our employees learn within our hotel/restaurant?

Collect answers on a flipchart or let participants write cards and collect on pinboard
Cluster the answers.

The results should be discussed more in depth.

The discussion can be informal. However it should appreciate the value of the existing forms of learning. After all that the hotel or restaurant exists means that it must do most things right and learn.

After that limitations should be discussed as well as potential for improvements.

In many cases a "formal" SWOT analysis of the learning opportunities can be beneficial.

If the general SWOT analysis has already been done the results can be used to go in deeper detail, analysing individual learning practices. Use the model presented in chapter 2.10.1 and discuss in detail about the workplace learning. This discussion have the aim to clarify the strategy for workplace learning that is suitable and will assure the success of the business.



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2.24.1 Analyzing Needs and Opportunities from Problem Analysis

A general methodology useful for an in-depth analysis of any problem, whether with the situation of the hotel or restaurant in general or the training opportunities in specific, is a problem tree analysis.

While this guideline in general does not include general facilitation techniques, this specific technique is mentioned here, since a good mastery of this method will be useful in many of the steps in the process, including the training needs analysis.

Also the method of mind mapping is summarized here, as it is an elementary technique as well, which can be used in various situations, like when getting a discussion going by collecting spontaneous ideas about it.

Problem Tree Analysis

The problem tree analysis is linked with the SWOT Analysis and represents a useful tool for identifying and defining of problems (linked with company weaknesses and threats from external environment), as well as for identifying the objectives and necessary actions.

The main idea is that each problem is caused by existence of several factors and also represent a cause for other problems.

Problem tree is represented as a diagram that reveals the relation cause- effect.

Main steps for applying this instrument are:

- enunciation of the problems (as many as possible) occurred in the company
- identifying the causality between problems and prioritizing the problems taking into consideration this causality
- choosing the main problem that could be solved and could determine important results for the employees and company



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- considering the problems that determine the existence of choosing problem as being causes and those which are derivative from the choosing problem as being effects and establishing the objectives considering the causes and expected results – considering the effects.

In order to identify the solutions, in solutions tree the negative aspects from problems tree are turned into desirable, positive aspects.

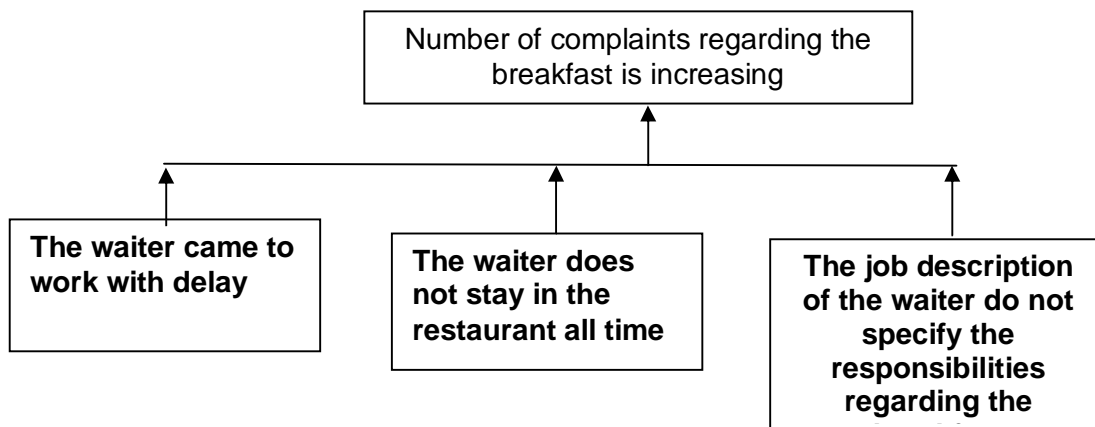
Example:

Mr. Popescu, the owner of the hotel “Three Stars” identified that in the last week 5 clients complained that at the breakfast they had to go to the kitchen and ask for bread, because no one came to bring more bread.

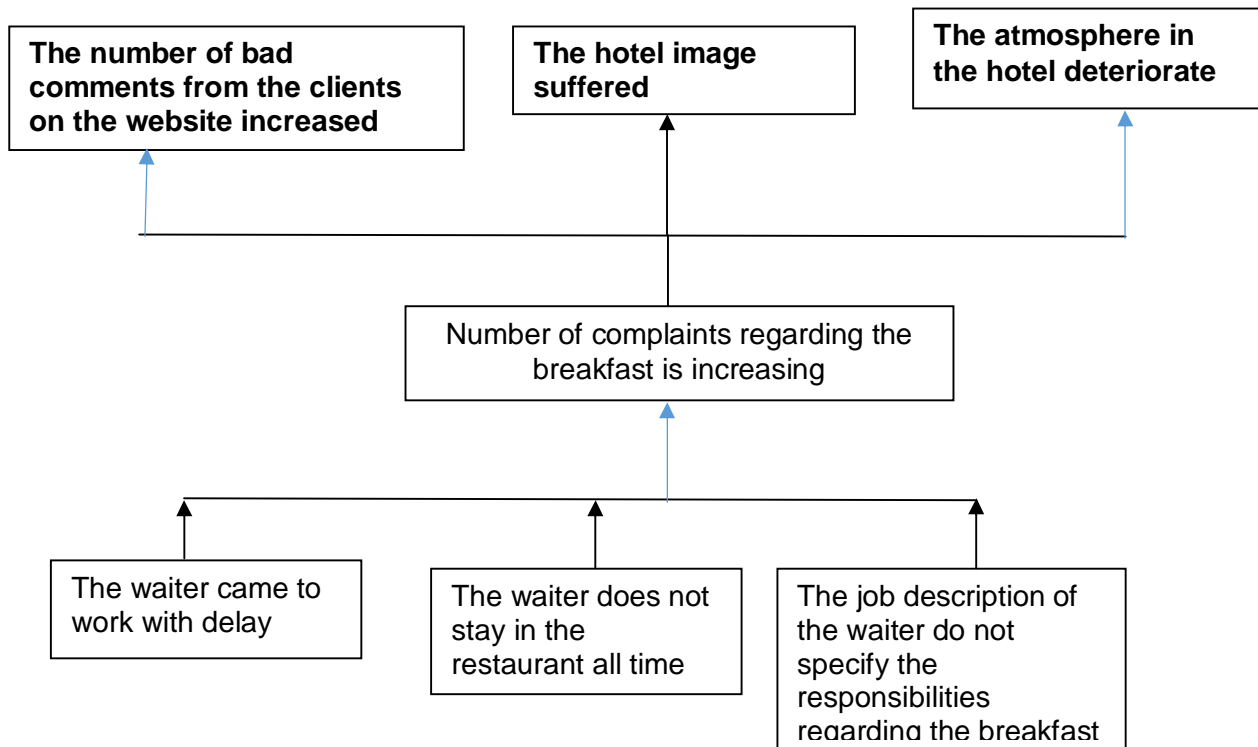
So, he identified the main problem being increasing the number of complained regarding the breakfast.

Number of complaints regarding the breakfast is

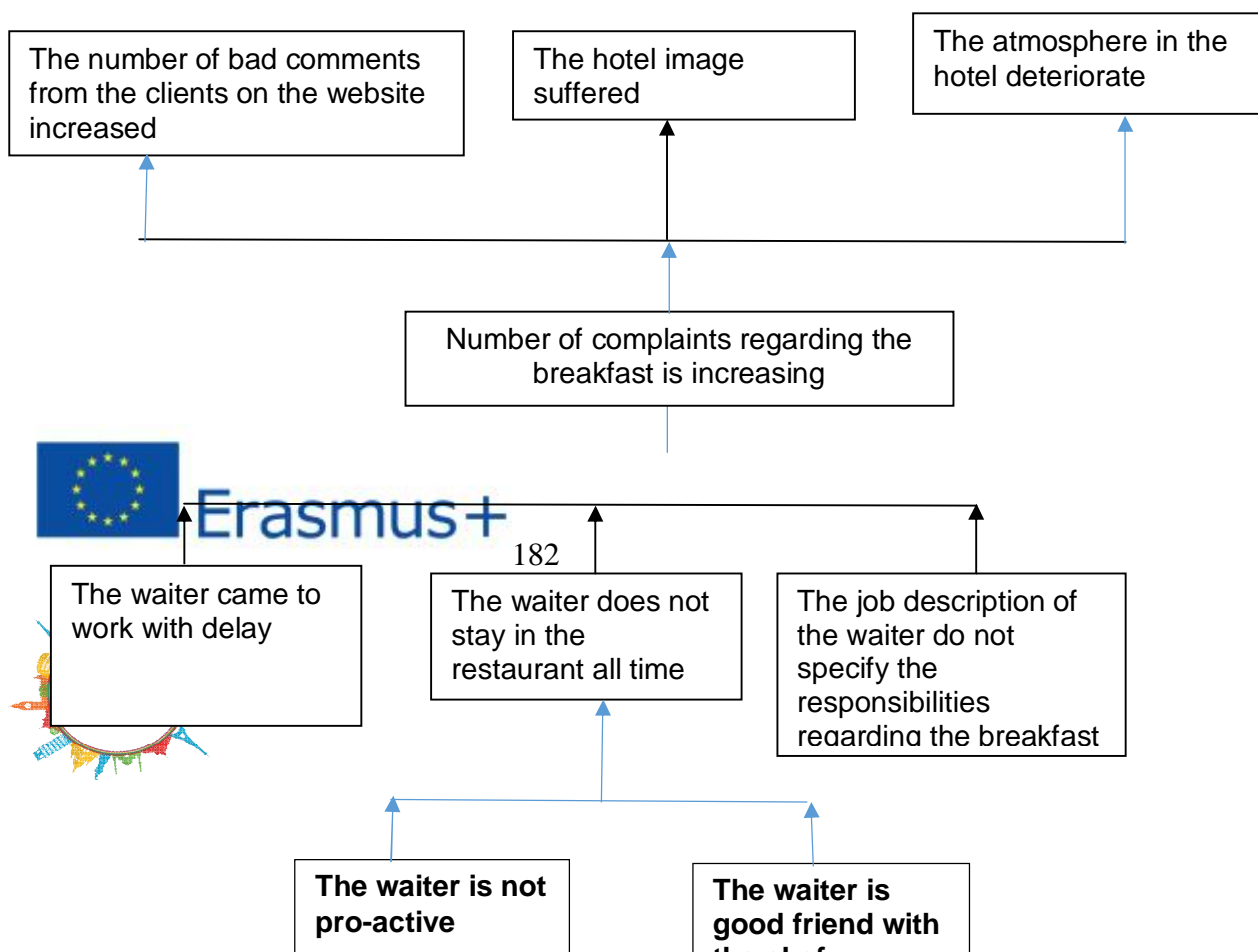
Discussing with the workers he identified the following causes:



The effects of the complaints:



Mr. Popescu discussed with the waiter about his responsibilities for the morning and found out that the waiter thought that it was the chef's responsibility to check if something is missing from the table and he was doing this only as a courtesy to the chef; also the owner found out that the waiter does not have a pro-active attitude in the morning and is waiting for the chef's requests.



The solution for this situation is a self-learning programme for the waiter to stimulate his pro-active attitude and self-reflection on the job responsibilities.

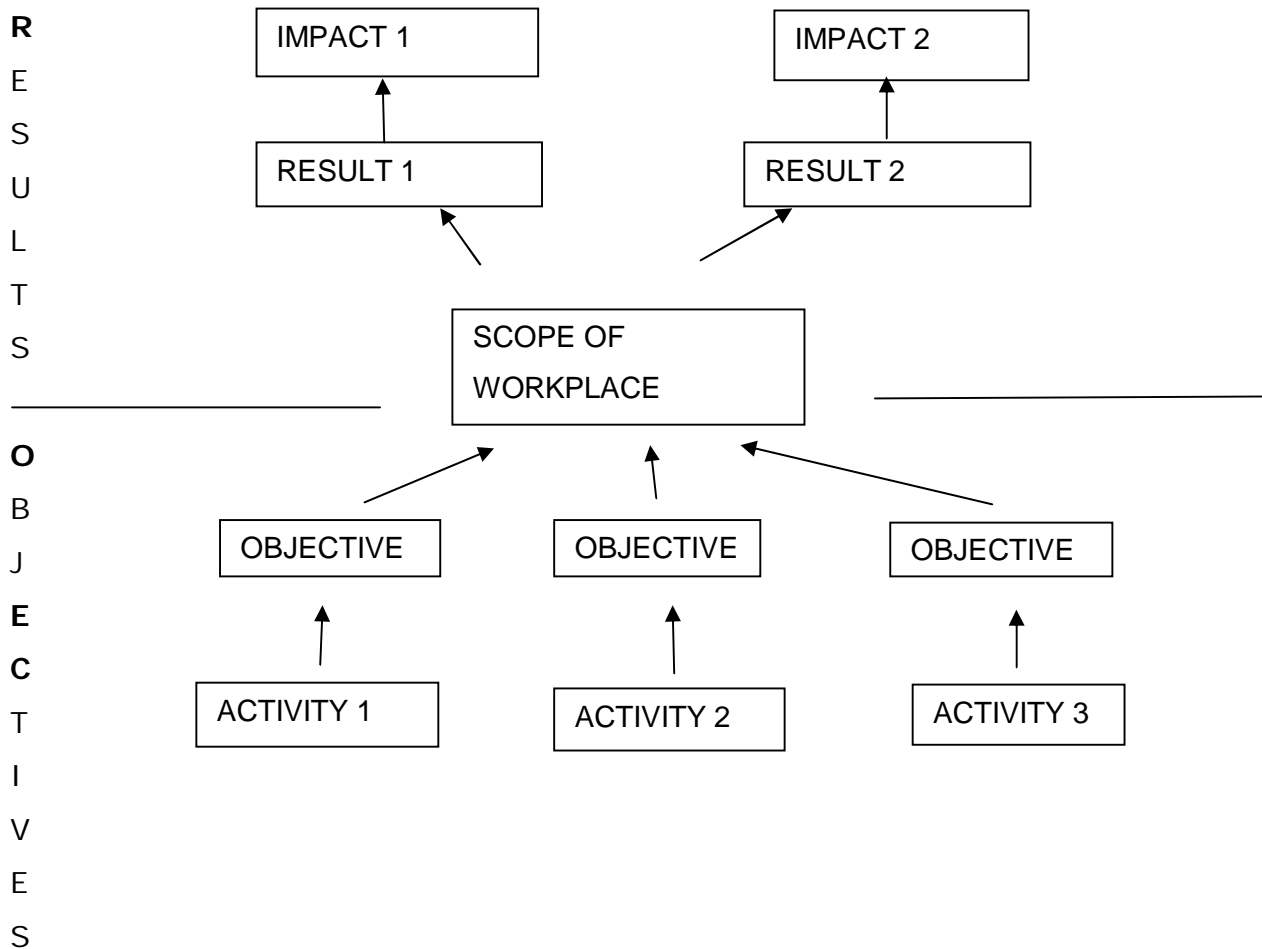
The following diagram represents the solution tree, based on the problem tree diagram.

The core of the Solution Tree is the aim of the learning activity. The manager will plan this activity including the methods to measure the impact of the self-learning activity. The involvement of the worker is crucial because s/he has to plan also the learning time, even it is about some materials to be read and to reflect upon and then introduce small changes in the behavior or about observing someone's attitude and reflect upon it and then introduce changes in the self-behavior.

In the example with the hotel "Three Stars", the owner found out that the scope for workplace learning is the key competence: Sense of Initiative and Entrepreneurship. By developing this competence not only with the waiter, but with all his personnel, the involvement of the staff in the business will produce benefits.



Diagram – SOLUTIONS TREE



So, please help Mr. Popescu to draw the Diagram for the Solution Tree!

Mind Mapping

Mind map is an instrument that could be used for selecting the best good practice for workplace learning.



Mind maps are used for structuring the ideas, solving problems and taking decisions. By presenting the ideas in graphical, radial form, mind map encourage brainstorming.

For understanding better this instrument, below there is proposed a group activity related to selecting the best good practice for workplace learning:

Group activity

The objective of the activity is that the participants should identify the positive consequences and critical points of good practices related to workplace learning.

Main steps:

Write in the center of the flipchart the word "good practice"

Apply brainstorming for identify the effects of good practices

Write the ideas on post-its (a post-it for each idea)

Group the post-it in 2 categories that include the effects of good practice to:

- company's activities
- employees activities

As conclusion: what are the positive effects of good practices and what elements should be modified?

2.24.2 Background: Discussion of Methodologies of Learning Needs Analysis

Systematic learning will mostly require a degree of analysis of the training needs.

The main problems in tourism are very similar across countries: low pay, very high demand for staff flexibility and mobility, high staff turnover, high share of informal employment arrangements and persistent skill shortages. The sector also suffers from its highly seasonal character and is very vulnerable to external political and economic factors. Employment in such conditions is insecure. Over 95 % of companies employ



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fewer than 10 people (ETC, 2004). The specific nature of company size structure in tourism and the fact that the sector is practically non-unionized affect common HRD practices among tourism enterprises. The continuous complaint from employers in the sector regarding skill gaps and shortages curiously coincides with few training offers among tourism companies. At the same time, Employer recruitment practices often demonstrate a deliberate preference for un- or low qualified workers (normally cheaper) over qualified personnel.

In spite of the fact that many research activities into skills issues in tourism are taking place in Europe and worldwide, research in early identification of skill needs in the sector (i.e. with a longer-term perspective) are still exceptionally rare. This has several causes: persistent statistical gaps for this sector; domination of SMEs which are traditionally averse to research; very weak role of social partners, i.e. partners for discussion of research results and their transfer to practice. The numerous research activities are rather isolated, and hence offer limited impact and only partial transfer to policy and practice. The vulnerability of the sector makes it very difficult to cast any predictions and thus imposes additional problems for early identification of skill needs.

A learning needs analysis is a formal method of regularly examining the needs and requirements of staff. If organizations do not regularly invest in learning, they will not be reactive to change and competition.

This should be done regularly to avoid a 'knee-jerk' reaction to altering situations. A well conducted Learning Need Analysis will better ensure that the real needs of the organization and individual are met, that specific targets are met. A Learning Needs Analysis will also allow organizations to plan the future skills of teams in relation to organizational goals and planned future change.

If training is targeted and individuals get the specific learning they need, the outcomes or returns will be better and participants will be more motivated. Each will



know that they have been considered individually, rather than just as a number in a group and this will engender loyalty and motivation.

Although the level of methodological effort may vary at least some reflection is indispensable in all situations of individual or organisational learning.

There is no unified and agreed methodology of training needs analysis. A German portal for facilitators alone lists 30 different tools.

But we can identify some basic types of TNA, we want to mention and of which the consultant facilitator should be aware.

A model of analysing general attitude and extra-functional competences of employees, compared with standards set by the hotel or restaurant, a approach focussed on problems and deficiencies in the work-process, a systematic requirements approach and a dialogue model, based on dialogue with employee groups or individual employees.

All of these approaches define the training needs as the result of a subtraction of the actual state of competences and qualification (however defined and measured) from the desired state of competences and qualifications.

Of an individual employee, a work-group or a company as a whole

Training need

= desired state of qualifications & competences – actual state of qualifications & competences

Data which influences the training decisions is available from a number of sources – both internal and external. To ensure that the right training is delivered to the right individual there must be enough data gathered as one-off may be as a result of a coincidence or anomaly rather than a genuine need.



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If training recommendations are made on the basis of an opinion, rather than based on verifiable facts or figures, check to see they are justified. Sources such as activity logs, appraisal documents, consultants, current employees, customer feedback forms, employee satisfaction surveys, focus groups, health and safety audits, interviews, management information systems, personal development plans, observation, questionnaires, personal records, sales figures or training records are good sources of such information.

Team Occupational Needs

Learning is not just needed by individuals. Within a team there are needs which may be specific to that group of people. The ability to solve problems, communicate, make decisions and simply work together are all characteristics of productive teams and are skills that may need to be learned. The learning needs of teams may be better known to the team leaders and will need to be addressed on a collective basis. Team leaders may have responsibility for the training and development.

If learning activities will enhance achievement of organizational or team goals, then they must be considered. Checking if there is actually team work among the members or whether they are too independent, and if coaching would be as or more effective than actual training, should be done.

Do the members of the teams understand their value in achieving goals?

Does everyone clearly understand the expectations of them?

[2.24.2.1 Learning needs analysis from assessment of employee extra functional competences and attitudes](#)

Organizations operate in a continually changing environment and it is essential that employees have the skills and behavior to address these issues.

Performance should be regularly assessed to determine what training and development are necessary.



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The annual appraisal interviews are a good start, and should include on-going learning development plans, but there really needs to be more frequent checks made. The development of individual learning plans for those for whom you have responsibility is a process that ensures inclusion of necessary skills and behaviors. The Learning Needs Analysis is a good method for ensuring that all points are covered and needs met.

A well-thought out and developed Learning Needs Analysis is a method for reducing the subjective elements of training decisions and focusing training more accurately. To conduct such an analysis, the tasks of a job must be analyzed to identify the range of skills necessary for the employee to perform their jobs in the organization. This may be done through a survey listing each skill and asking several questions about it. The questions will relate to a perceived need for learning in each skill and the perceived importance of the skills in the employees' jobs. The objective is to determine the learning needs and to be able to order those needs on the basis of importance.

For a complete needs analysis that corresponds as closely as possible to reality, even if the object observed is changed certain principal areas of analysis remain constant, albeit assuming a different importance and weight; these include:

- The companies,
- The needs expressed by workers
- The new market orientations/requests, - the training offer of the sector investigated

An evaluation form for employees can be found in Ch. 2.25.3.1

The information gathered through the learning needs analysis, therefore, will be necessary elements in planning a training path for trainers who will have to conduct activities to fill the skill gaps present in the sector being examined and at the same time have allowed us to draw a picture of the whole which has allowed the research team to understand the "state of the art" of "tourism for all" and detect indicators of



knowledge about and awareness of this topic. The way of conducting the training needs analysis and the related instruments have been designed and realized keeping in mind three important aspects of the object under observation, and those are:

- The needs of tourists with special needs;
- The tourism supply system;
- The training offer for the tourism industry



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2.24.2.2 Method of Defining Training Needs by Analysing Problems in the Service Production and Delivery Process

This approach was developed in the Leonardo da Vinci pilot project „Learn and Work“ and has been tested also in the Leonardo da Vinci project “SocialSME”. The methodology turned out to be well received and can be easily adapted to the Tourism Sector. A worksheet for implementing this methodology is included.

In order to work with the method, the technique of problem tree analysis that has been described above can be used.

The approach suggests doing the analysis with the owner and/or managers and employees of a certain functional unit. It can also be adapted to reflect problems and challenges in very small units.

The methodology does not imply that all occurring problems have their cause in a insufficient qualification of employees.

It suggests taking also other factors into consideration. Specifically the extended version of the tool provides a methodology to discriminate other causes from the deficiency in qualifications.

Such additional factors might be unclear aims and mission of the hotel or restaurant, unclear definition of work processes and expectations, or other deficiencies of management as well as problems with the quality of materials and installations as well as other factors.

Therefore the scope of the methodology reaches beyond a mere learning needs analysis and is a demonstration of the principle of close interconnectedness of learning and general quality management and management in general.

The methodology has the following Steps:



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1. Analysis of critical situations (Chances and problems)
2. Identification of work processes
3. Identification of functional areas
4. Defining a list of functional outputs
5. Identification of causes of weak output
6. Identification of abilities that have to be developed
7. Planning of training measures

For the needs of smaller hotels and restaurants a very basic version of this method is appropriate.



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Example TNA 1: Worksheet for the reflection of training needs²⁵

Symptom	Cause	Process	Department /group	Training need			Solution specification evtl. Reference to additional action plan)	Problem review until/by
				Desired output	Employee	Solution		

²⁵ Adapted from Learn&Work, Module 1,TNA, p.6

Example TNA 1: Worksheet for the reflection of training needs – exemplary analysis

Symptom	Cause	Process	Department/group	Training need			Solution specification evtl. Reference to additional action plan)	Problem-review until/by
				Desired output	Employee	Solution		
High rate of criticism of quality of breakfast from customers	Unawareness of customers preferences	Customer communication	Management Head of breakfast room	Awareness of customer preferences (evtl diverse groups)	Manager Head of breakfast room	Communication with each customer about breakfast quality and preferences	Customer communication checklist	April 2016-04-15 Senior Mgn. Smith
	Lack of skills in breakfast presentation skills	Breakfast preparation and presentation	Breakfast Working Group	95% satisfaction rate	All employees in breakfast shift	Learn quality breakfast preparation and attractive presentation	Review preparation practices Benchmark breakfast quality with competition Identify expert Define production process Define feedback process	

Etc....								
Etc...								



Erasmus+



2.24.2.3 LNA from Reflection of Changing Demands

A second method of TNA approaches the issue more reflectively. It works in three steps:

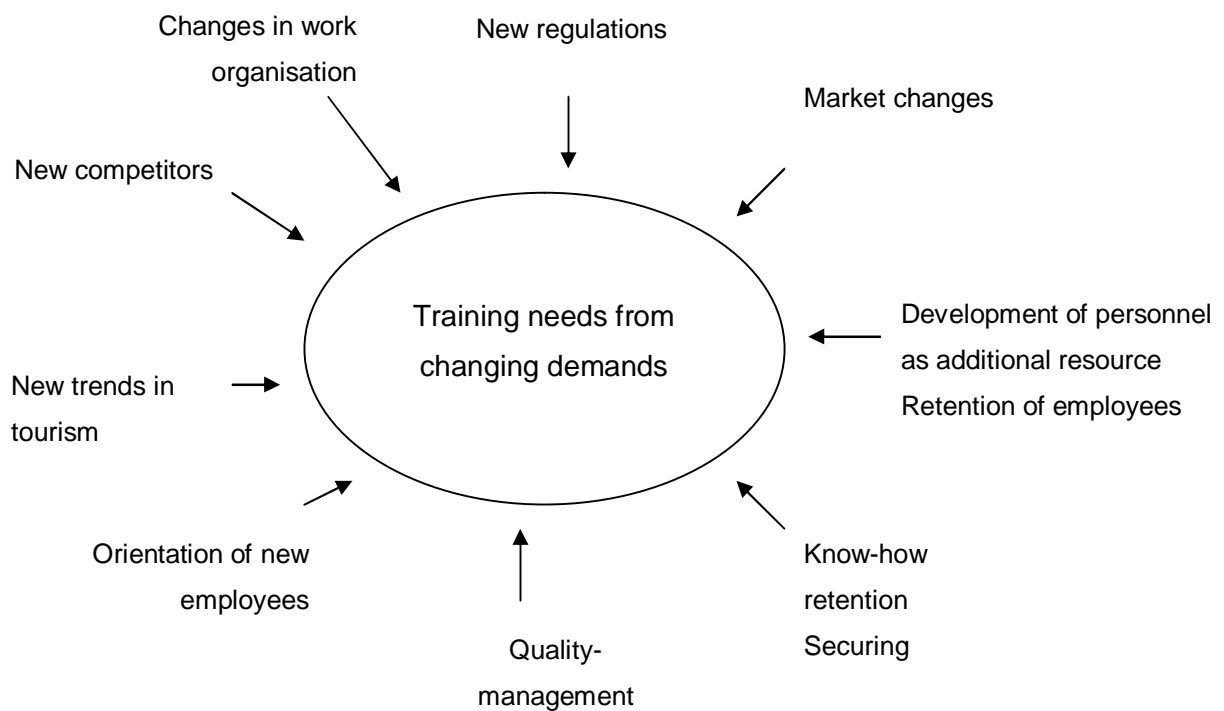
- Identification and reflection of qualification needs drivers
- Definition of a qualification demands profile
- Deriving a needs vs. qualification inventory overview

In the first step potential influences are discussed. The illustration below covers some, but of course additional influences or completely different ones are also possible, depending of the character of the hotel or restaurant and its markets and general strategy.



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III.: Drivers of qualification needs

These drives must then be translated into a profile for certain workplaces.
At this point it is only important to mind the systematic importance of this step.

Not only the existing processes and qualification needs should be taken into account, but also the external influences and changes that can be anticipated. Experience shows that also a very basic reflection of these circumstances can vastly improve the quality of the training needs analysis. Such reflection proved to be as valuable as much more complex scientific

The matrix shows which tasks can be executed by which employees.

An adapted version can use desired abilities instead of actual tasks. This demonstrates that the tool can easily be adapted for different situations.



The reflection, how an appropriate matrix for the respective situation has to be constructed is usually in itself quite conducive to reflection of the situation and learning about it, since it implies an analysis of the work process and desirable qualifications. A description of the respective levels of abilities should supplement the overview in the matrix. Usually these descriptions are written by workgroups of expert workers and superiors.

This matrix is often used to make the optimum qualification level in a certain area transparent.

It also gives an overview which employees can do which tasks.

In very small to mid-size establishments the owner will usually claim that he/she has the content of such a matrix "in the head", which often is true. However closer discussion often shows that the understanding is unprecise and a closer inspection can raise the awareness of actual gaps, underused talents and competences etc.

A consequent gradual closing of qualification gaps then leads to higher general flexibility of the workforce.

Aggregated over the whole company it summarises the qualification needs.

The second Step is a comparison of needed and actual qualifications.


























This is demonstrated in the following example.



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b) Overview. Comparison of needed and actual qualifications

Qualification Matrix Hotel/Restaurant/Workgroup				
	Name	Name	Name
Task 1				
Task 2				
Task 3				
Task 4				
.....				
<p>Level of qualification demanded:</p> <p> = basic skills/basic training</p> <p> = can do task with supervision</p> <p> = full ability to execute task without supervision</p> <p> = can train others</p>		<p>Level of qualification existing:</p> <p> = basic skills/basic training</p> <p> = can do task with supervision</p> <p> = full ability to execute task without supervision</p> <p> = can train others</p>		<p>Training needs:</p> <p> = Employee should be able to fully execute task without supervision, but has only basic skills. Gap shows training need</p>

Black segments represent the actual qualifications; remaining white segments indicate a qualification/training need.

A plan of training activities has to cover these white segments. As the highest level of competence indicates, expert workers are defined by their ability to train others in the respective task.

Experience shows that the analysis of individual qualifications is a sensitive issue. Employees are compared among each other but also vs. a standard. This can be understood as a negative judgement about the individual worker, but should not. After all it is the responsibility of management to provide adequate training opportunities.

Management should involve employees and workers representatives in implementing this.

The principles of appreciative inquiry should be used also here: start with appreciating the fields of excellence and encourage the acquisition of additional skills and competences by expanding the level of talent shown in the fields of excellence to additional fields, rather than forgetting about the excellence and ending up with a discouraging list of deficiencies.

2.24.2.4 Training Needs Analysis by Dialogue

A TNA is only useful if all actors in the hotel or restaurant are convinced of the use of learning and training for them individually and the company as a whole.

Negative expectations lead to open or covered resistance. This is true even for owners and managers, when they understand an analysis of their hotel or restaurant as a critique of their leadership.

Negative expectations are even more common, when a methodology is implemented from the outside or top down.

Methodologies of dialogical needs analysis are based on the insight that the needs analysis is not so much about a "scientific" collection of "objective" data. Rather it is at least to the same degree about the reflection about the motivation for improvement, finding sensible and appropriate learning pathways and the needs as perceived by the actual actors. Training needs in this perspective are no given objective fact, but rather a social construction of the actors concerned.²⁶ This is the approach followed in this guideline.

The methodologies described in the paragraphs above have proven useful in a wide range of situations that are characterised by quite static demands. When confronted with dynamic situations where a lot of influencing factors are to be included and even future trends have to be anticipated they should be complemented by dialogical methodologies.

²⁶ Literatur: Gerst, D., Kranz, A., Möhwald, H.: Ermittlung von Qualifizierungsbedarf im moderierten Gruppengespräch und im Einzelgespräch in: Gergs, H.J., Wingen, S. (Hrsg.): Qualifizierung für Beschäftigte in der Produktion. Praxishandbuch für Führungskräfte, Personalentwickler und Trainer. Eschborn 2004; Bachter, K.: Regeln zur Ermittlung von Qualifikationsbedarf im Betrieb, in: Berufsbildung 16 (CEDEFOP) www2.trainingvillage.gr/download/journal/bull_16/16_de_buechter.pdf

Proponents of these methodologies aim not only at covering qualification gaps, but also at building excess competencies to prepare for unforeseen situations and demands. Personal and professional development should not be oriented at a minimum qualification but should build as many resources as possible. This can be called a >resource-based strategy<.

A basic form is group discussions and individualised interviews.

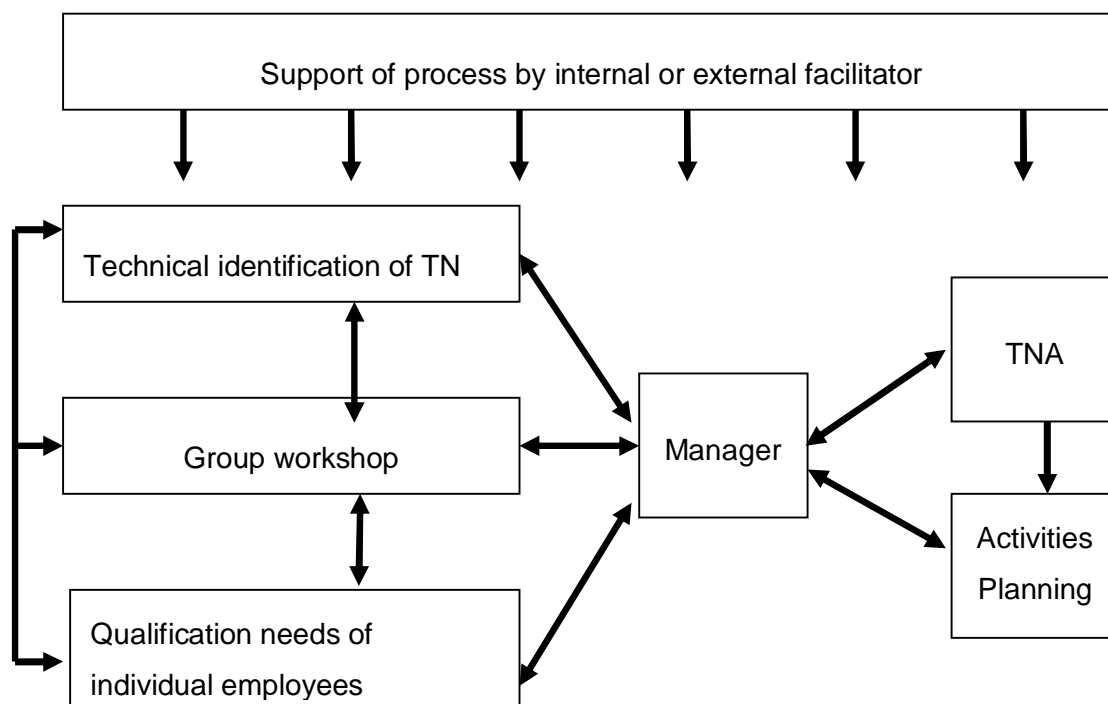
Group discussions should be facilitated in all departments where a TNA is implemented.

A template for a facilitated TNA session can be found below. The session will last about two hours and should be facilitated by the owner, eventually supported by a capable internal or external facilitator. The session can be attended by up to 10 people.

The workshop consists of an introduction, a general identification of training needs and a closer analysis. A clear visualisation of results should conclude the workshop.

Facilitators of the workshops should then synthesize the results of the different workshops and prepare further steps.





III.: Levels of dialogical TNA

The training needs identified should also be discussed on an individual level.

An individual training plan should be agreed upon by the manager and the individual employee.

Qualification needs that can be covered best in a group of employees (work groups) should be discussed in the group and training should be planned by the group.

Some points should be minded by the manager:

- Clarify the aim and expected results of the discussion.
- Motivate employees but also point out that active participation is expected
- Make clear that not every adaptation of qualifications is also a rise in the level of qualification that would justify higher salaries.

- Point out that not only formal training is training, but also informal forms of learning like work integrated forms (job-rotation, on job instruction by expert workers, quality circles, documentation of processes, job shadowing, etc.)
- Communicate results with the employee
- Communicate with the employee if suggestions made by the employee (very welcomed!) could or could not be implemented.
- Keep the delay between TNA and training implementation as short as possible, to keep up motivation.

Above methodologies for deducting training needs from the demands of the workplace have been discussed. These share a certain orientation on deficiencies rather than opportunities. Often it is in the common interest of employee and business if employees want to develop professionally and personally in a pro-active way. Companies therefore should support this learning by employees.

This can be introducing them to new tasks in the hotel or restaurant, but also training like language training, up-skilling in IT and soft skills seminars etc.).

Depending on the relative relevance of this learning for the company often companies cover parts of the tuition cost while employees contribute their free time. A method of needs analysis can be, as shown above, a survey among employees by their supervisors. Often this is part of the regular appraisal interview.



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2.24.3 : Note on Practicing and Deciding on a Methodology of LNA

Based on the methodological knowledge described in this chapter and on his/her understanding of the individual hotel/restaurant the consultant should design an individual way of training needs analysis that is appropriate for and accepted by the hotel/restaurant owner.

Also the methodology chosen should be acceptable for the core management team as well as the employees.

Agree on ONE methodology!

The analysis can be SIMPLE.

The point here is to get the process started and to inspire a reflection of the real learning needs.

The result must not be perfect, but it should be a visible improvement of the quality of insight into the issue.

Schedule the activities and the review of the results in the next step.

Be available for consultation by telephone.

Often it is helpful to call the hotel/restaurant partner between workshops to see how things are going.

This often helps to overcome the inhibition to ask for advice.

Often small things can stop the whole process.

Worksheet: Plan of Activities

LNA Implementation Plan



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LNA Activity	Aim/ Result	Specific Activities What to do?	Who	Resources	Person in charge (responsible)	Start/ End	Comment	Done

2.25. Step 4: Building KCLLL in TouriSME

2.25.1 Synthesis: Overview of Professional Competences, TouriSME specific Tasks and Key Competences

A very powerful tool for guiding the learning system of a hotel or restaurant can be the gradual creating of a matrix of general fields of competence, specific tasks included in these fields and the related extra functional key competences.

Developing and using this matrix will reveal which competences are needed, but also where, through practicing and learning which specific tasks the more general competences can be built.

This applies also to the Key Competences, which, as we claim, are the prerequisite of further learning.

The manager or owner therefore should always reflect where to deploy employees in order to build their competences.

Example

The main competences of tourism	Duration: 20 minutes
Explain what does it means by "key requirements"	Teaching and Learning Methods: Q & A, Brainstorming, Discussion
Ask learners: what are the main competences of tourism?	
<ul style="list-style-type: none"> • Friendliness • Helpful • Hospitable • Problem solvers • Dealing with the customers' requests • Have good human relations • Pay attention to personal care 	Resources: Coloured paper or coloured slides in ppt presentation

An employee who never gets to actually talk to somebody will rarely develop good communication skills; an employee who is never challenged to use its skills in calculating will forget these.

Such a matrix can also be further developed into an individual skill portfolio.

This guideline discusses only the general principle of such a portfolio along the example of selected knowledge of skills included in the German occupational profile of "hotel specialist".

The principle can be easily transferred to a hotel or restaurant specific matrix instead of following a formal occupational profile.

Also the principle can be used to collect individual portfolios, which might even be accredit able in some countries.

Field of Competence	Specific Task	Related Key Competence(s)
Kitchen Work	Checking product quality	Communication in native language
	Cooking techniques	



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	Preparing simple dishes	Learning to Learn
	Preparing pre-prepared dishes	
	Presenting dishes	
	
	
Dealing with Customers, consulting customers, selling	Reflecting personal appearance Hosting guests Identifying customer expectations Using foreign language terminology Informing guests about services and products	Communication in native language Communication in foreign language Learning to Learn Social Skills Cultural sensitivity Corporate spirit and sense of entrepreneurship
Etc.		

In Romania, the adults that want to develop their professional career or change the occupation due to crises or job shortage, can attend training courses. The curriculum is based on the Occupational Standards. Each standard is organised on "Competence Unit" and, according to the complexity of the work it can have 3, 4, 5 or more units.

Each occupational standard is divided in 3 chapters: basic competences, general competences at the workplace and specific competences. The basic competences are in general "Communication at workplace "and "Team work". The general competences at the workplace are related to the general regulations for security at the workplace and to organising the work.



For tourism sector and as an example regarding the relation with the key competences, you can find the standard for receptionist. This standard consists in the following types of competences: 2 basic competences (Communication at the work place, Team work), 3 general competences at the workplace (Applying the security regulations regarding the security at the workplace, Workplace organisation, Promoting the hotel image) and 4 specific competences (Payments, Check-in and check-out of the clients, Offering hotel services to the clients, Claimants solve):

Field of Competence (Unit of Competence)	Specific Task	Related Key Competence (s)
Communication at the work place (with colleagues, clients, services providers, taxi drivers etc.)	Receive information and transmit information	Communication in mother language
		Communication in foreign language
	Participate to the discussions	Communication in mother language
		Communication in foreign language Social and Civic Skills
Team work	Identifies the tasks of the job in the team	Sense of initiative and Entrepreneurship
	Participates to the team work	Communication in mother language Social and Civic Skills
Applying the security regulations regarding the security at the workplace (plug-in plug –out the equipment using electricity, fire security etc.)	Applies the security regulations	Communication in mother language Learning to learn
	Identify and announce the critical situations	Communication in mother language Learning to learn Social and Civic Skills
	Applies emergency measures	Communication in mother language Communication in foreign language Science/Technical skills
Workplace organisation	Evaluate the necessary materials for the workplace and ask for materials	Counting and calculating skills Sense of initiative and Entrepreneurship

	Verify the security of the workplace (in terms of integrity of the goods and money)	Sense of initiative and Entrepreneurship
Promoting the image of the hotel	Maintain the inside and outside of the hotel attractive for the clients (in terms of cleaning, the integrity of the flowers and other decorative panels, the furniture in the lobby , on the front of the hotel) with the help of the cleaning personnel and other administrative and technical staff	Sense of initiative and Entrepreneurship Communication in mother language
	Maintain a professional image	Learning to learn Social and Civic Skills
	Apply continuously the promotion methods according to hotel strategy	Communication in mother language Communication in foreign language Social and Civic Skills Using computer at work Learning to learn
Payments	S/he is checking the payment documents	Communication in mother language Communication in foreign language Counting and calculating skills
	S/he accepts the payment documents	Using computer at work Counting and calculating skills
	Is operating the payments	Using computer at work Counting and calculating skills
Check-in Check-out	Prepare the hotel reception for the clients arrival	Communication in mother language Using computer at work Counting and calculating skills
	Welcome the clients and make the necessary registrations	Communication in mother language Communication in foreign language

		Social and Civic Skills Using computer at work
	Organises the clients departure	Communication in mother language Communication in foreign language Social and Civic Skills Using computer at work
	Prepare reports and current registrations	Communication in mother language Using computer at work Counting and calculating skills
Providing hotel services to the clients	Welcome the clients	Communication in mother language Communication in foreign language Social and Civic Skills Cultural awareness and expression
	Identify the client's needs	Communication in mother language Communication in foreign language Social and Civic Skills
	Provides specific information	Communication in mother language Communication in foreign language Social and Civic Skills Using computer at work Sense of initiative and Entrepreneurship
Solving the clients claims	Receives the complaints	Communication in mother language Communication in foreign language Social and Civic Skills
	Verify the complaints	Communication in mother language Social and Civic Skills

		Counting and calculating skills
	Solve the complaints in the benefit of the client	Communication in mother language Communication in foreign language Social and Civic Skills Sense of initiative and Entrepreneurship

2.25.2: Introduction to Modular Learning Material for Building KCLLL in TouriSME Employees

The project has developed modular learning materials for learning and developing Key Competencies for Life Long Learning, specifically for employees in Tourism.

The consultant should present and describe the material, discuss it with the hotel/restaurant owner and facilitate finding the most appropriate learning opportunities for implementing the modules in each hotel/restaurant.

The results of the overview matrix from Ch. 2.24.2.2 should be used to find the best situations where the exercises from the modules can be used.

2.25.2.1 : Brainstorming of Learning Opportunities

Do a brainstorming²⁷ session on learning opportunities in the company.

Document the results on a pin board or flipchart.

²⁷ For a description of the method see <http://en.wikipedia.org/wiki/Brainstorming>

If necessary you can support the discussion of these results with references to methodologies described in Ch 2.5.

You can use phrases like “Some companies use methods like..... Do you think this would be useful in your company?”

The main aim of the facilitator should be to keep the discussion open and avoid cutting corners, i.e. having only well-known and already used methods mentioned (like “Sending them to a seminar, but we do not have funds for that”).

2.25.3 : Making Learning Plans

Underlying Philosophy

As discussed, employee development is key in developing in sustaining competitive advantage of hotels and restaurants. All employees are entitled to have access to opportunities, a proper learning environment to gain the knowledge, skills and experience necessary to perform their roles to the highest possible standards and to achieve personal and business goals. Employees take ownership and initiative of their own learning, development and employability.

Benefits

The Individual Learning Plan is first and foremost a tool created for the employee's own benefit and personal growth. It provides employees with a structured guidance on how to focus the development activities on getting better at the job and on increasing the employee's contribution to team performance and overall business results.

Key Principles



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- The employee is responsible for ensuring that he/she has an individual development plan which has been produced as a result of an individual development planning session with his/her manager.
- Development should be tailor-made to the individual employee and relevant to your business goals.
- Employee and line managers discuss what work assignments would be developmental and / or of interest.

In addition, consideration can be given to how current work assignments can be expanded or adjusted to meet developmental needs.

- Managers are responsible for coaching their employees and helping them arrive at successful completion of the agreed upon action plan.

Individual Learning Plans

Purpose of an ILP

An individual learning plan (ILP) is a uniquely tailored plan that contains developmental activities to enhance one's capability to meet current and future job responsibilities. The manager and the employee have joint responsibility for developing and implementing the ILP; the employee is responsible for accomplishing the learning activities.

The supervisor's role in the ILP process is to provide information employees need to plan realistically and to guide them in identifying knowledge, skills, and abilities that will help them perform in their current job while helping the organization meet its goals.

An Individual Learning Plan is a formal document identifying an individual's learning and developmental goals. ILP is uniquely tailored to the needs of the individual and the organization.



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The following process, and the tools provided for developing Individual Learning Plans may assist you in profiling and supporting your employees.

Table 1. Stages in an Individual Learning Plan

Stage 1	Stage 2	Stage 3	Stage 4
Identifying the employees needs	Determining adjustments that need to be made to the curriculum	Completing and implementing an Individual Learning Plan	Monitoring and evaluation

1. First, *the employee should reflect on his/her job* and identify development needs for the job, as guided by the workbook.
2. The *employee organizes a meeting with his/her superior manager*, discusses and agrees on the development goals which have to be beneficial for the individual and the organization and agrees on a draft of action plan
3. *Employee writes a detailed action plan setting the steps and activities* necessary for achieving the agreed development goals. The manager ensures support of other people who should be involved in the action plan execution and ensures resources. Agreement between the manager and the employee about the action plan is equal to their full commitment to the realization of it.
4. *Monitoring and evaluation* (M&E) are ways of finding out how well an education project or activity is achieving its goals and objectives. This will influence decisions about whether or not to continue a programme or practice, or how to improve it



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2.25.3.1.Evaluation Form For Self-Assessment Of Development Needs

Name:

Work place:

Organizational unit_____

Date:

Evaluator: _____

1. What goals and objectives have or would I set for the next period?

2. Development of which knowledge and skills I need for achieving these goals?

What knowledge and skills should I develop to be successful in this business the next 3 years?

3. What other resources do I need to achieve the stated objectives of development?



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4. What could prevent me to achieve these goals? Till when will I make it?

5. What help do I need to develop the required knowledge and abilities? What do I expect from my superior in the process of development?



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2.25.3.2 Development Planning Template

Name and Surname:				Organizational unit:					
The assessment of current competencies		Self- estimate (worker)		Evaluation (Manager)			Feedback from the survey		
How a person meets expectations	Not achieve d	Achieve d	Exceede d	Not achieve d	Achieve d	Exceede d	Not achieve d	Achieve d	Exceeded
Effective communication (conflict resolution, awareness)									
Commitment and responsibility									
Competence									
Representing the interests of the company									
General impression (appearance, kindness, positive attitude)									
The development goals of employees (fulfills manager)									
Short-term goals (3-12 months)				Long-term goals (1-3 years)					
Field of development Knowledge and skills need to develop				Field of development Knowledge and skills need to develop					



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Development goals of employee (filled in by employee)			
Short-term goals (3-12 months)		Long-term goals (1-3 years)	
Field of development	Knowledge and skills need to develop	Field of development	Knowledge and skills need to develop

Individual Development Plan (Filled in by manager)				
Development activity	Detailed description of development needs	The role of the manager	Targeted date of activities realization	Status / result

	Date		Manager	Employee
Plan created	_____	and agreed with it	_____	_____
Revision of plan made	_____	and agreed with it	_____	_____
Evaluation of the Plan made	_____	and agreed with it	_____	_____



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Ensuring learning plans reflect the diversity of needs

There are many means of which we could attempt to have employees learn the new skills, but some methods are better than others. Effective training programs are designed around logic and sound learning theories.

Certain conditions must exist to enhance learning:

Need: The employee acknowledges their need to learn. They must be driven to acquire information to enhance their skills.

Motivation: Something triggers a response in the individual to cause them to choose to act on their need. Perhaps disapproval from superiors or fellow team members, perhaps they feel less productive than others.

Action: Learning at this point becomes the correct response to the perceived need of the employee.

Positive Response: After the training is undertaken, comments of approval, and improved outputs will all reinforce that the training was a successful undertaking for the employee

An individual development plan (IDP) is a uniquely tailored plan that contains developmental activities to enhance one's capability to meet current and future job responsibilities. The manager and the employee have joint responsibility for developing and implementing the IDP; the employee is responsible for accomplishing the learning activities.

The **supervisor's role** in the IDP process is to provide information employees need to plan realistically and to guide them in identifying knowledge, skills, and abilities that will help them perform in their current job while helping the organization meet its goals. Employees can expect help in:

- Understanding the IDP process and its purpose
- Identifying their strengths and weaknesses in performing their current work assignments
- Pinpointing areas where they could take greater responsibility
- Obtaining access to learning resources

The **employees** should initiate the IDP process for career progression and personal development. Employees should also participate actively in planning goals and how they will meet them.

ROLES AND RESPONSIBILITIES

EMPLOYEE

- initiates and drives own development
- creates development plan with support and agreement of to “who” he/ she reports
- seeks support from the HR function, whenever necessary
- engages and enrolls in designing and executing development activities
- applies new skills, knowledge and behaviours on the job
- solicits feedback on performance

MANAGER

- sets the good example by developing and executing his/her own IDP
- provides an environment and culture that values employee development
- is acting as a role model, living our values and operating principles
- motivates all direct reports for timely preparing and producing development plans
- provides input for the creation and implementation of development plans
- seeks support from the HR function, whenever necessary
- removes obstacles to the employee’s development
- secures and allocates resources to the employee’s development
- provides feedback as the employee uses the new skills
- gives plenty of recognition to the employee for successful execution of the development plan.

IDP EXERCISE for employee

Answer the following questions:

- What do you hope to gain by improving in this competency?
- What will your organization gain by your improvement in this competency?
- What will help you achieve your goal?
- What could get in the way?

Ensuring procedures maximise people's access to learning opportunities

Developmental activities are undertaken by an individual to achieve a developmental objective. Some objectives may be achieved by the familiar means of formal training and attending events such as seminars. However, the skills, knowledge and abilities that comprise many competencies may be better learned and practiced by means of other activities. There are ranges of learning opportunities that exist for employees in tourism, such as:

Activities other than formal training classes or attending meetings (In most cases, these activities are not as expensive as formal training, they can often be accomplished without travel while on the job) that are appropriate for ILPs include the following:

- Job shadowing.
- Reviewing and analyzing examples.
- Internship, apprenticeship.
- On-the-job training.
- Video- or computer-based instruction.
- Special project/assignments.
- Structured interviews with content experts.
- Reading.
- Research.
- Correspondence courses.
- Self-development.
- Mentoring.
- "Just doing it."
- Rotational assignments.

Such learning opportunities are discussed in more detail in Ch. 2.19

DISTANCE LEARNING

Distance learning is a modern form of education for tourism, most suitable for retraining or upgrading knowledge in certain fields. Distance learning in tourism is often proposed as a modular programme and can be built on the following modules:

- (a) economy and accounting, economy and tourism;
- (b) informatics: basic module;
- (c) tourism informatics;
- (d) local cultural: historical geography;
- (e) cultural: historical geography of Europe;
- (f) cultural: historical geography of the world;
- (g) management: basic module;
- (h) tourism marketing;
- (i) international tourism;
- (j) tourism management;
- (k) legislation of tourism;
- (l) guides and delegates in tourism;
- (m) psychology: basic module;
- (n) tourism psychology;
- (o) regional development and creating regional products;
- (p) statistics: basic module;
- (q) tourism statistics;
- (r) tourism technology;
- (s) tourism theory;
- (t) tourism trends and new products;
- (u) sustainable tourism;
- (v) world language 1, world language 2.

Tourism can make use of distance learning, which can satisfy different student and professional groups. The quality of distance learning is based mostly on online applications created by professionals and can be considerably improved through online textbooks, unified course structure, detailed study time plan, different communication tools, student motivation and an information server. It is advisable to combine distance learning with face-to-face consultations and seminars to ensure personal and language skill development.

⇒ **WORKPLACE LEARNING PLAN**

Learning plan is necessary not only for monitoring the learning activities but also for a better understanding and participation from trained employees.

Planning workplace learning is based on workplace learning needs identified in the company and it includes the following main phases:

- identifying the proper learning facilitators (internal/ external)
- establishing workplace learning objectives and expected results
- preparing the schedule of workplace learning and materials
- evaluation and feedback from participants

Example of planning the phases of workplace learning:

Nr.crt.	Activity	Period	Responsible person
1	(Prior) Identification of workplace learning needs		Manager, facilitator
2	Identifying the learning facilitators	Month 1	Manager
3	Establishing workplace learning objectives and expected results	Month 2, 1 st week	Manager and facilitator
4	Preparing the schedule of workplace learning and materials	Month 2, week 2 - 4	Facilitator
5	Workplace learning	Months 3 – 6	Facilitator
6	Evaluation and feedback from participants (trainees)	Month 7	Facilitator

The training plan for employees has in view to plan the workplace learning taking into consideration the competencies to be acquired/ developed/ improved, the methods for workplace learning and resources necessary:

Name and surname of employ

Competencies to be acquired/ developed/ improved	Methods for workplace learning	Necessary resources	Period for training	Assessment and evaluation

Workplace learning plan must be pursued and revised in time with all the changes occurred during its implementation, including feedback from employees and manager.

Bibliography

Training Manual for Consultancy Services Suppliers, ROCA (Reteaua Organizatiilor de Consultanta in Afaceri), 2006

WBL-TOI Manual – Manual for Planning Workplace Learning – innovations transfer, Pirjo Väyrynen, 2010

2.26 Step 5

2.26.1: Notes on Structure of Meeting 5

Results:

- Facilitator is updated with the implementation of the workplace learning plan
- Client has got new insights and inspiration by interacting with the external partner
- Client is aware of the results of the implementation of the workplace learning
- Client reflects on building a learning system
- Client is planning the activities for developing the learning system based on key competences and the vision over the business

The workshop is very important and the entire management team should participate to emphasize all the situations in which the changes in the competences proved the efficiency. The facilitator should prepare a set of questions to help the management

team to reflect easily and to come with examples of good practice observed during the period of implementation (between step 4 and step 5).

2.26.2: Making Key Competency Development Systematic: Creating a Competency Development System

As discussed, learning is a win-win strategy for hotels and restaurants and employees alike.

Managers, employees and their representatives as well as the society as a whole must take care of this issue more than in the past.

Owners, managers and employees and workers must work together to gradually build learning systems in companies.

By “learning system” we mean systematic provisions to make sure that there is a perfect and dynamic fit between the knowledge, skills and competency needs of the hotel or restaurant and knowledge, skills and competencies of employees.

Among these the key competences for Life Long Learning are the fundamental ones, as these are the ones which allow for further learning and adaptation, but also commitment, purpose of sense, co-entrepreneurial outlook and general well-being.

A learning system comprises all provisions to assure

- adequate opportunities for employees of all age groups and educational background to develop and preserve and increase the value of their work
- preserve and increase their employability on the basis of a recognized and certified competencies or profession
- by using adequate learning methodologies and practices
- on a continuing basis.

Among other things this means

- finding the right applicants and apprentices,
- organizing a smooth transition between initial and further training,
- to include all employees, also those who are more senior or lack a high level of formal education or have special needs.

Only rarely such a system can be built in one effort, given the existing resources, but every hotel and restaurant, small or big, will have to build a long term strategy to

make sure that the small steps that can be done on a daily basis contribute to a consistent and adequate learning strategy.

Therefore the exercise suggested here gives the opportunity to step back a bit and integrate the detailed results of the prior exercises as well as the first experiences from the learning process and the exercises implemented, and discuss again the general strategy and vision of the learning system.

The template provided has been used in prior projects like SOCIALSME and others. It has proved to be one of the most popular and fruitful.

Therefore a whole session can be devoted to this discussion, which should be well documented, with the help of the facilitator.

2.26.3 Template: Reflection on a Learning System

Note to the facilitator: Please have the participants reflect individually and then collect results on a pin board. Discuss results with the group.

Discuss with the group a three year perspective for building a learning system. The vision should be formulated as concisely as possible! The perspective taken is a virtual "look back": what will the hotel or restaurant have done in order to achieve the individual components?

Use the SMART (Specific, Measurable, Acceptable, Realistic, Timed) criteria!

In three years we will have found enough qualified staff by.....

A large, empty rectangular box with a black border, intended for participants to write their reflections on finding enough qualified staff in three years.

In three years we have attracted young people for training by...

A large, empty rectangular box with a black border, intended for participants to write their reflections on attracting young people for training in three years.

In three years we have adapted our staff to a changing market and changing customer expectations by...

A large, empty rectangular box with a black border, intended for participants to write their reflections on adapting staff to a changing market and customer expectations in three years.

In three years we have developed the key competencies of our staff by....



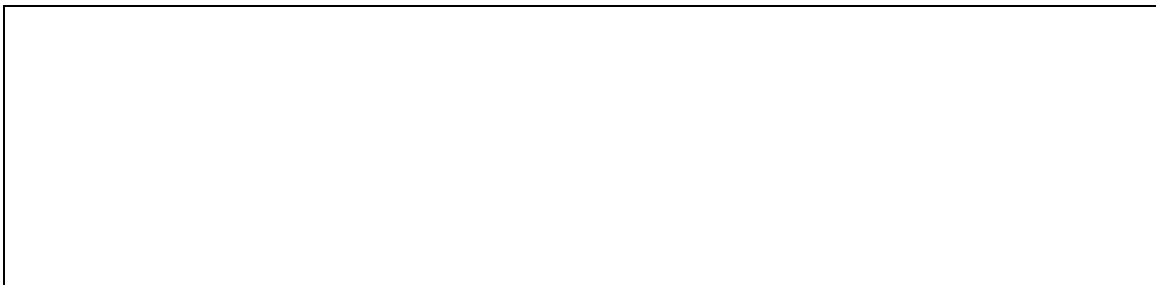
We have prevented the core staff leaving the company by...



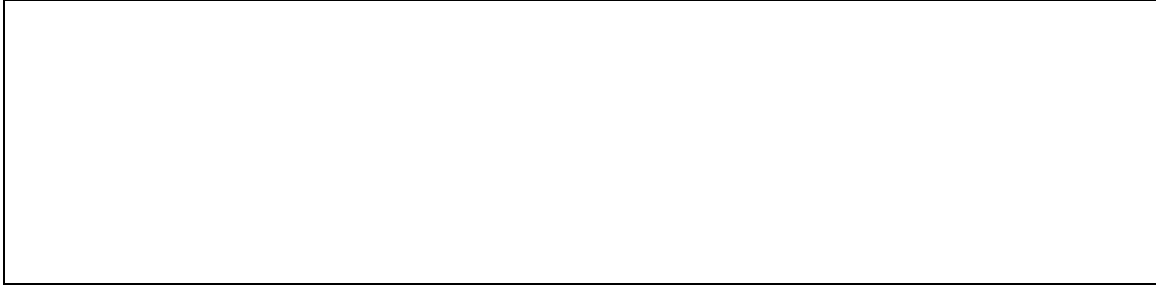
We will have prevented employees "rusting" by...



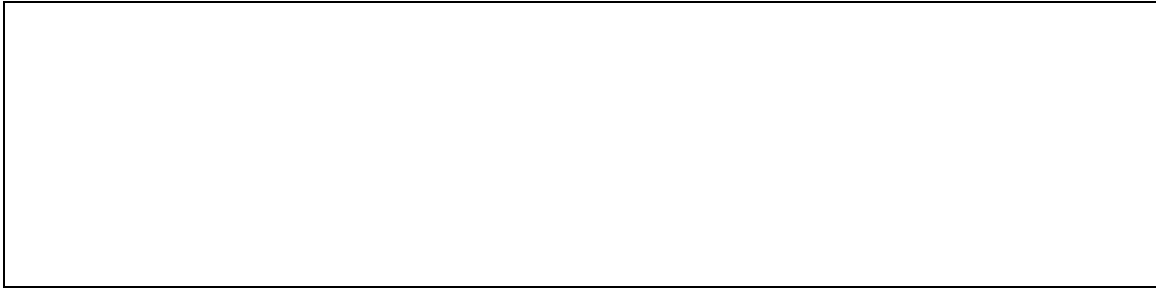
We prevented employees having to leave because of health problems we....



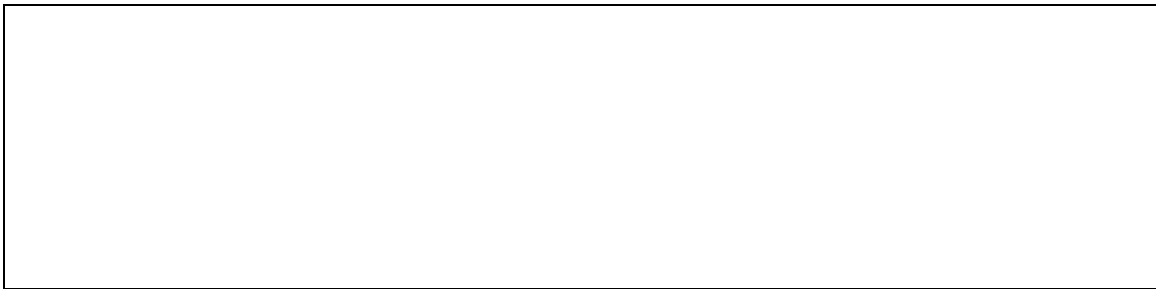
For our "high potentials" we ...



In three years we will have trained management staff by...



In three years we will have better engaged and committed staff for which working in tourism is only a "second choice" by....



In three years we will have gradually built the competences of low qualified staff by....



2.27. Step 6 Reflection and Evaluation

2.27.1 : Notes on Step 6 Reflection and Evaluation

Workshop 6 is scheduled for about six months after the beginning of the process. Depending on the level of activities and dependent on the implementation of step 3-5 you will have been in more or less close contact to the hotel and restaurant project team.

Therefore the schedule should give the opportunity to wrap up developments in a quite open format. This will stimulate recalling the plans and approaches with which the process started, recall the individual activities and generally “warm up” the group.

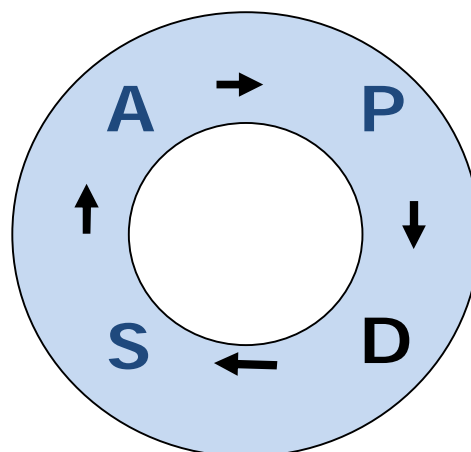
The rest of the workshop will be devoted to reflecting this discussion with regards to the plans of activities and indicators that were developed by the company.

The aim of the workshop is to **initialise a new loop of reflecting and planning of activities**, thereby expanding the scope and intensity of the activities and potentially plan further cooperation.

This follows the cycle of “PDSA” (Plan, do , study, act) (adapted from Deming, W. Edwards: The New Economics. Cambridge 2000, p. 132)

Act - adopt the results of the piloting, change them, expand them or abandon them. (Step 6 ff.)

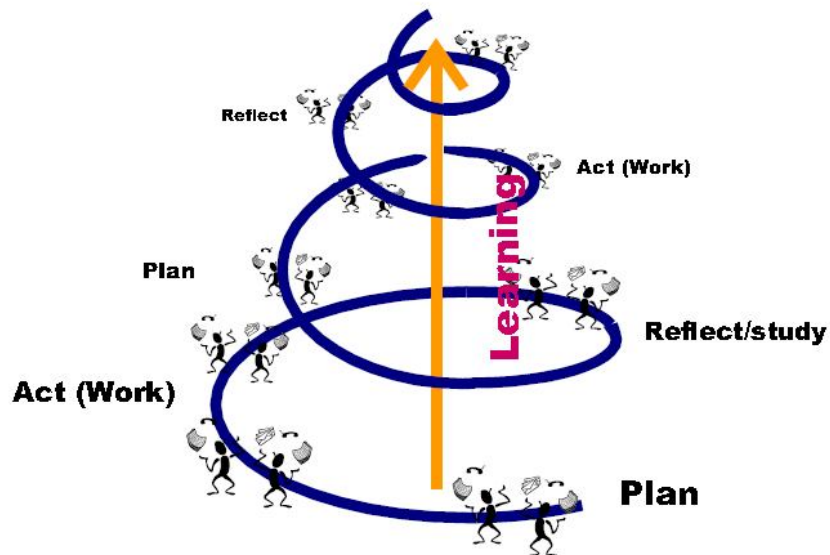
Study the results of the piloting. What did we learn? What went wrong? Cont and Step 6



Plan the development of KCLLL development activities (WS 1-2, opt. 3)

Do the pilot implementation of KCLLL activities parallel to the continuing planning and monitoring process (Step 1-5)

This cycle reflects the general improvement of work through learning. It can also be represented by an upward spiral of working, reflecting and learning.



Adapted from: Stahl, Thomas: The Learning Organisation, Brussels 1993

Reflecting the Implementation

Start with a flipchart exercise, asking the following questions:

- What happened since we last met?
- What happened since the beginning of the process, can you outline the development?
- How did XXXX (employees, management team, etc. respond?
- What did surprise you?

Ask additional questions as necessary. Visualise the answers on the flipchart, either in free format or as a mind map.

Then the next step go to the actual version of the plan of activities, developed in Step 3-5.

Visualise the plans. Options for doing this are:

- Writing the main points on a flip chart
- Handout
- Looking on them on a Beamer Presentation

Help the pilot group to tell the story of how they derived the plan and measurements.
How did measuring the activities, of having concrete targets, influence their activities?
Was monitoring helpful?
Were there any problems (understanding, implementation, resources...)?

Expansion of Strategy

Go through the process again.

If major adjustments are necessary or desirable, go through the whole process of again (virtually).

If only improvements and expansions are needed, base the further planning on the existing documents.

Update the plan of activities.

Next Steps

Discuss and agree on further steps and activities. Discuss possibilities and options of further cooperation.

Use a free format of discussion, but don't forget to visualise results in a "TO DO" list on flipchart.

Be available for clients and keep contact.

If a regional cluster of hotels and restaurants going through the TouriSME process emerged, a sensible activity to encourage and expand competency development activities is the initialisation of a formal network of hotels and restaurants interested in HR development in order to share experiences and potentially use synergies (common seminars etc.).

Note to the Facilitator

Do not forget among the technicalities of planning and monitoring, that this process has the aim to inspire actual and realistic learning activities. Therefore the discussion with the group within the hotel or restaurant must at all times be focussed on this topic!

Feel free to take your time to meet the pilot groups' needs in discussing this!

The planning and strategy tools presented here can help to make activities more systematic and persistent. Nevertheless working with these tools should at no point get in the way of developing and the activities.

Use tools, but don't be a tool freak!

Q	QUESTIONS
W	WHICH
E	EXPAND
S	SALES AND SERVICE
T	TECHNIQUES

1) Wich of the following are necessary to be a successful Sales Person or Service Provider

- a) Ability to understand and react to different types of Customers and their needs.
- b) To be able to provide explanations when things go wrong.
- c) To have the will to succeed and be better at what you do than others.
- d) Knowing what to say and how to say it to achive the desired results.
- e) Having state of the art technology.

2) Wich of the following is the most important part of your job

- a) To leave on time.
- b) To exceed the customers expectations
- c) To generate the income
- d) To be flexible
- e) Sticking to the rules

3) The elements of my behaviour that will generate a positive – Yes I Can image- are:

- a) Using words that demonstrate enthusiasm, action and willingness to help.
- b) Taking ownership of situations.
- c) Providing solutions.

- d) Using body language that sends messages that I am interested and want to help.
- e) Just doing my job.

Read the following scenarios and select which action you consider would be the most appropriate for that situation.

1) A Customer complains that they booked an LCD projector and it has not been supplied. Your conference order shows clearly that they did not book one. Do you:

- a) Politely explain that there was not one ordered but you will see what you can do to get one.
- b) Tell them that if it had been ordered it would have appeared on the form.
- c) Explain that it was your mistake and that you had not been told but you will get one.
- d) Confirm when the Customer needed the projector and let them know that you will get one immediately.

2) A Customer states that they held a conference 1st year at your hotel and has decided to hold the conference in the same venue this year. Do you:

- a) Start by asking question to establish their requirements.
- b) Ask the Customer to hold a moment and explain that you are very busy.
- c) Tell the Customer that you are not sure whether you would have space for the week concerned.
- d) Tell the Customer that you are pleased that they are going to use your hotel again- personalize the call with the Customer and start establishing their needs from them and by using details from the previous conference.

3) You enter a conference room to deliver some additional refreshments that were requested. There are eight people in the room being given a presentation. Do you:

- a) Keep your head down and leave the room as quietly as posible.
- b) Interrupt the group leader and ask if they need anything else.
- c) Look up and give the opportunity for the group leader to make eye contact and ask for anything else.
- d) Reach across the table to clear cups and glasses.

Select whether the statements are negative or positive

Positive Negative

- | | | | |
|--|-----|-----|-----|
| 1. The only room available is the Kings Room | | | |
| NEG | | | |
| 2. You can up grade the room but is fairly expensive | | | NEG |
| 3. We have business class rooms available all week | POS | | |
| 4. The rules are that you have to confirm the booking within two weeks | | | NEG |
| 5. You have up to fourteen days to confirm the booking | POS | | |
| 6. I can help you with that | | POS | |
| 7. We can do that straight away | | POS | |
| 8. The room will not be available until 2pm | | | |
| NEG | | | |
| 9. You must provide us with final numbers by January 10th | | | NEG |
| 10. I can arrange that it will only take ten minutes | POS | | |
| 11. We do not have any 2003 rates | | | |
| NEG | | | |
| 12. The room is next to the elevator | | POS | or |
| NEG | | | |
| 13. Our conditions allow you to- | | POS | |
| 14. I don't know how to do that | | | |
| NEG | | | |
| 15. I will find out for you | | POS | |
| 16. The dates we have available are – | | POS | |

17. I can't

NEG

18. The menu is fairly limited

NEG

19. All I can do is

NEG

20. Yes I can

NEG

TEMPLATES:

3.1 : Interviewing Template „Reflective Interview for hotel/restaurant owners/managers

Date:

Name (of facilitator):

Hotel/restaurant:

Number of employees:

Interview partner (s):

Position(s)

Short Description of the Activities:

What are the general characteristics of your hotel/restaurant?

(Discussion points: organisation, customers, outreach)

How did the hotel/restaurant develop?

What are the main resources (strength) and challenges?

What did change in recent years?

Learning Policy:

What is your policy concerning your employees? (hiring, fluctuation, qualification, motivation)

How do you hire and train your employees?

Do you have an explicit learning policy?

Can you describe situations in which training went particularly well?

Can you remember a situation when you liked your performance as a trainer / coach of your employees particularly well?

Can you describe a situation when an employee surprised you with unexpected initiative and skill?

How many employees leave your company per year? Is that of concern for you?

Are there situations where you think your employees could need more qualifications?

Are there customer complaints or other quality problems?

Can you describe situations when managers or employees were particularly active in teaching their own skills to other employees?

3.2. SWOT Analysis of the hotel/restaurant

<u>STRENGTHS (+)</u>	<u>WEAKNESSES (-)</u>
<u>OPPORTUNITIES (+)</u>	<u>THREATS (-)</u>

--	--

SWOT matrix:

		OPPORTUNITIES			THREATS		
		1 ...	2 ...	3 ...	1 ...	2 ...	3 ...
STRENGTHS	1. ...		X				
	2. ...						
	3. ...			X			
WEAKNESSES	1. ...					X	
	2. ...						
	3. ...						

3.3. : Template: Visualization of next Steps

Stakeholder in Tourism	Vision the situation in 3 years
Owner of the hotel/ restaurant	
Management team	
Customers	
Employees	
Local authorities	
Etc	

Template: Next Steps

Activity	Specific Actions What to do?	Who	Responsible	Start / End	Comment	Done

3.4: Template: Feedback Paper

Name of facilitator

TouriSME Logo

Partner Organisation
Logo

Step.
No.

Date:

Name (of facilitator):

Hotel/restaurant:

Number of employees:

Interview partner (s):

Position(s)

Documentation of Conversation

General characteristics of the hotel/restaurant?

(Discussion points: organisation, customers, outreach)

Development of the hotel/restaurant develop

Main resources (strength) and challenges?

Change in recent years?

Learning Policy:

Policy concerning employees? (hiring, fluctuation, qualification, motivation)

Situations in which training went particularly well

Situation when you liked your performance as a trainer / coach of employees

Situation when an employee surprised with unexpected initiative and skill

Critical situations, which reflect a need for action, e.g. employees leave the hotel/restaurant, customer complaints etc.

Other:

Exercise on Vision and Mission:

Discuss and Visualise

What is your hotel/restaurant mission?

Why are you in this business, what is the purpose and how in general do you want to be seen by your customers?

We are in this business because....

We will.....

Our customers see us as.....

What about your vision about your business – what is your main goal? Where do you want to be in 5 years?

In 2021 we will...

What are the three most important things you have to do to support your vision coming true?

To support our vision the three most important things we have to do are...

- 1.
- 2.
- 3.

Note: It will take some effort to find a good formulation. Please take care to support this by visualising the attempts on flipchart. Document the final version by taking a picture.

Please discuss: what competences will you need to achieve these things?

For 1. we will need.....

For 2. we will need.....

For 3. we will need.....

Exercise on competences:

What are the most important and what are the most urgent competences the employees of your hotel or restaurant need to support your vision coming true?

Order the competences according to the size of the gap you perceive between the competences needed and the actual competences!

+ IMPORTANCE -	1 Make and implement development plan to maintain and utilise core strength	2 Act boldly, make and implement development plan plus emergency action
	3 Do something about it: Refocus business focus? Move to where competences are needed?	4 Forget about it
	+ Level of Competence in hotel/restaurant -	

Acting “entrepreneurial” i.e. treating every customer as if it was the employees own business	Ability to interact with and address the needs of customers from different cultural backgrounds
---	---

Template: Competence Cards

Copy and cut, order on pinboard

Writing in own language	
Communication with customers in own language	Reading/understanding written instructions in own language
Talking to customers in foreign language	Writing in foreign language
Basic (calculating and checking bills, supplies etc.)	Advanced Calculating (Rule of three, creating Excel Sheets etc.)
Advanced computer use (installing programmes, Security, putting info online, producing complex documents	Basic computer use (reading, printing, E-Mail, retrieving information, input information to templates)
To have ambition and willingness to learn more	Methods of self-regulated learning (learning with colleagues, reading job-
To have the capacity to establish and follow learning objectives	General dexterity (ability to cope with new and unexpected situations)
General "soft skills" as good manners, ability to show a positive	General "pro-active" attitude

3.5 Competence Development Goals

Please mark clearly the result of fields 1, 2 and 3. Focus on maximum three competences development fields per field

Cut out these 3 most important and write onto a pinboard

What should the situation be concerning these competences in three years, in one year?

What could be the first step?

Activity	Who should have the competency?	What should the situation be in 3 years? General description in bullet points	What should the situation be in 1 year? General description in bullet points	In which area/team/workplace are we excellent in this competence?	Which activity in our hotel/restaurant can build this competence?
A					
B					
C					
Et c.					

3.6Template: Assessment of Individual Extra Functional Competences

Hotel/Restaurant:

Date:

Employee:

Independence and interest towards work

<input type="checkbox"/> Very interested, improves his job continuously, independent and reliable.	<input type="checkbox"/> Showing interest towards work and strives to do it the best possible way. Mainly can do his tasks independently.	<input type="checkbox"/> Shows interest for work, it is necessary to periodically monitor and encourage	<input type="checkbox"/> Shows little interest towards work and should be frequently monitored and encouraged
<input type="checkbox"/> Professional behavior and appearance exceeds the expected standards and represents a model for other workers.	<input type="checkbox"/> Behavior and appearance fully satisfies expected standards of work, the manager need very rarely to correct him.	<input type="checkbox"/> Behavior and appearance are mainly with the expected standards of work but sometimes the manager need to correct him.	<input type="checkbox"/> Behavior and appearance are sometimes not in line with the standards of work, ignores the instructions of managers.
<input type="checkbox"/> Very flexible and regularly jumps in whenever necessary, eager to help in a variety of jobs.	<input type="checkbox"/> Regularly available when required, accepts schedules to different jobs.	<input type="checkbox"/> Ready to help co-workers if so requested from him, but mainly trying to stick to his job.	<input type="checkbox"/> Avoids to help others in their work or come to help out, stick's to his job.
<input type="checkbox"/> Exceeds the expected knowledge and skills needed to perform given tasks	<input type="checkbox"/> Has all the necessary knowledge and skills to perform the given tasks.	<input type="checkbox"/> Have most of the knowledge and skills necessary to perform given tasks.	<input type="checkbox"/> Knowledge and skills are generally not sufficient to carry out given tasks.
<input type="checkbox"/> The tasks are often executed before the requested time.	<input type="checkbox"/> Tasks almost always executed in the required time.	<input type="checkbox"/> The tasks are often done in the required time.	<input type="checkbox"/> Tasks mainly not done in the required time.
<input type="checkbox"/> Maintains very good relationship and communication with all guests, guests like him.	<input type="checkbox"/> Refers attentive and friendly to all guests, cope well in most situations.	<input type="checkbox"/> Maintains mainly a good relationship with guests, but sometimes can't handle some situations.	<input type="checkbox"/> Avoids contact with guests, sometimes impolite to them.

Professionalism and work discipline

Flexibility and availability

Knowing the job

Working speed

Relationship with colleagues

Relationship with guests

<input type="checkbox"/> Actively contributes in creating a friendly working atmosphere, favoured as a collaborator.	<input type="checkbox"/> Supports a friendly working atmosphere, very good relations with colleagues.	<input type="checkbox"/> Does not distort the working atmosphere, maintains satisfactory relationships with colleagues.	<input type="checkbox"/> Undermines the work atmosphere, in a bad relationship with most of colleagues.
<input type="checkbox"/> Description of very good performance	<input type="checkbox"/> Description of good performance	<input type="checkbox"/> Description of performance that should be improved	<input type="checkbox"/> Description of unacceptable performance
<input type="checkbox"/> Description of very good performance	<input type="checkbox"/> Description of good performance	<input type="checkbox"/> Description of performance that should be improved	<input type="checkbox"/> Description of unacceptable performance
<input type="checkbox"/> Description of very good performance	<input type="checkbox"/> Description of good performance	<input type="checkbox"/> Description of performance that should be improved	<input type="checkbox"/> Description of unacceptable performance
<input type="checkbox"/> Stands out with his work in comparison with other workers, we definitely want to keep him.	<input type="checkbox"/> Successful at work as most other workers.	<input type="checkbox"/> Need to work on certain skills and behaviors.	<input type="checkbox"/> Not recommended for further cooperation.

Priority field for hotel/restaurant development 1 (if not covered)

Priority field for hotel/restaurant development 2 (if not covered)

Priority field for hotel/restaurant development 3 (if not covered)

Overall impression


























Evaluated

Confirmed

Template Training Needs Analyse 1: Worksheet for the reflection of training needs

Symptom	Cause	Process	Department /group	Training need			Solution specification evtl. Reference to additional action plan)	Problem review until/by
				Desired output	Employee	Solution		

Qualification Matrix- Comparison of needed and actual qualifications

Qualification Matrix Hotel/Restaurant/Workgroup				
	Name	Name	Name
Task 1				
Task 2				
Task 3				
Task 4				
.....				
<p>Level of qualification demanded:</p> <p> = basic skills/basic training</p> <p> = can do task with supervision</p> <p> = full ability to execute task without supervision</p> <p> = can train others</p>		<p>Level of qualification existing:</p> <p> = basic skills/basic training</p> <p> = can do task with supervision</p> <p> = full ability to execute task without supervision</p> <p> = can train others</p>		<p>Training needs:</p> <p> = Employee should be able to fully execute task without supervision, but has only basic skills. Gap shows training need</p>

Worksheet: Plan of Activities

LNA Implementation Plan								
LNA Activity	Aim/ Result	Specific Activities What to do?	Who	Resources	Person in charge (responsible)	Start/ End	Comment	Done

3.7 Evaluation Form For Self-Assessment Of Development Needs

Name:

Work place:

Organizational unit_____

Date:

Evaluator: _____

1. What goals and objectives have or would I set for the next period?

2. Development of which knowledge and skills I need for achieving these goals?
What knowledge and skills should I develop to be successful in this business the next 3 years?

3. What other resources do I need to achieve the stated objectives of development?

4. What could prevent me to achieve these goals? Till when will I make it?

5. What help do I need to develop the required knowledge and abilities? What do I expect from my superior in the process of development?

3.8 Development Planning Template

Name and Surname:				Organizational unit:					
The assessment of current competencies		Self- estimate (worker)		Evaluation (Manager)			Feedback from the survey		
How a person meets expectations	Not achieve d	Achieve d	Exceede d	Not achieve d	Achieve d	Exceede d	Not achieve d	Achieve d	Exceeded
Effective communication (conflict resolution, awareness)									
Commitment and responsibility									
Competence									
Representing the interests of the company									
General impression (appearance, kindness, positive attitude)									
The development goals of employees (fulfills manager)									
Short-term goals (3-12 months)				Long-term goals (1-3 years)					
Field of development	Knowledge and skills need to develop			Field of development	Knowledge and skills need to develop				

--	--	--	--

Development goals of employee (filled in by employee)				
Short-term goals (3-12 months)		Long-term goals (1-3 years)		
Field of development	Knowledge and skills need to develop	Field of development	Knowledge and skills need to develop	
Individual Development Plan (Filled in by manager)				
Development activity	Detailed description of development needs	The role of the manager	Targeted date of activities realization	Status / result

--	--	--	--	--

	Date		Manager	Employee
Plan created	_____	and agreed with it	_____	_____
Revision of plan	_____	and agreed with it	_____	_____
made	_____	and agreed with it	_____	_____
Evaluation of the	_____	and agreed with it	_____	_____
Plan made	_____	and agreed with it	_____	_____
	_____		_____	_____

Template of individual planning of workplace learning

Name and surname of employee:

Competencies to be acquired/ developed/ improved	Methods for workplace learning	Necessary resources	Period for training	Assessment and evaluation

3.9 Template: Reflection on a Learning System

Note to the facilitator: Please have the participants reflect individually and then collect results on a pin board. Discuss results with the group.

Discuss with the group a three year perspective for building a learning system. The vision should be formulated as concisely as possible! The perspective taken is a virtual "look back": what will the hotel or restaurant have done in order to achieve the individual components?

Use the SMART (Specific, Measurable, Acceptable, Realistic, Timed) criteria!

In three years we will have found enough qualified staff by.....

--

In three years we have attracted young people for training by...

--

In three years we have adapted our staff to a changing market and changing customer expectations by...

--

In three years we have developed the key competencies of our staff by....

--

We have prevented the core staff leaving the company by...

--

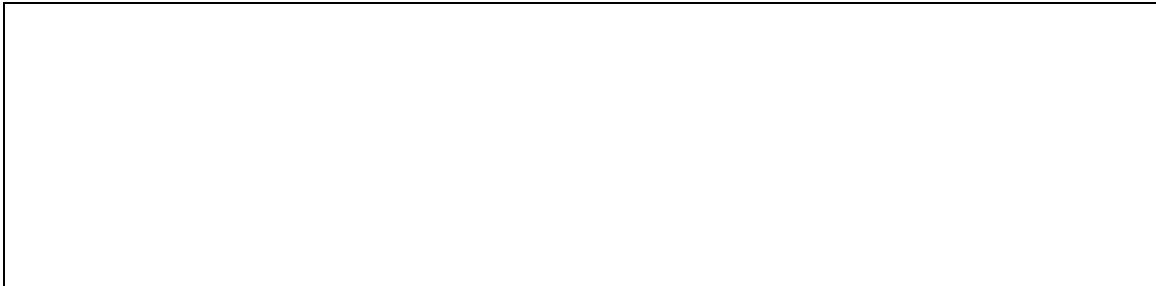
We will have prevented employees “rusting” by...

--

We prevented employees having to leave because of health problems we....

--

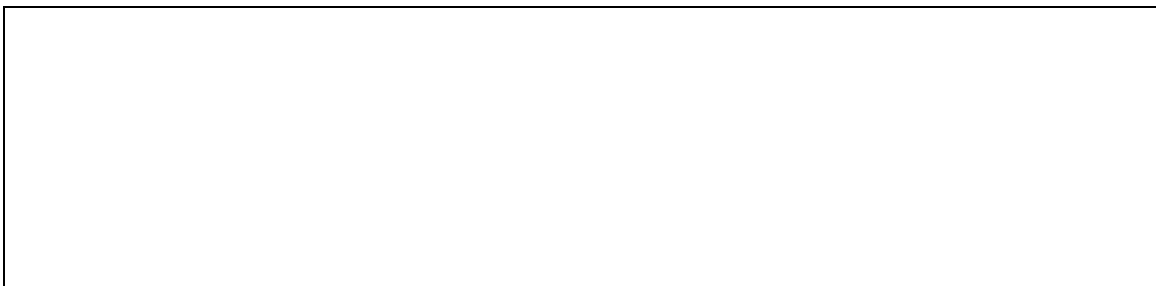
For our “high potentials” we ...




In three years we will have trained management staff by...



In three years we will have better engaged and committed staff for which working in tourism is only a “second choice” by....



In three years we will have gradually built the competences of low qualified staff by....



QUEST

1) Which of the following are necessary to be a successful Sales Person or Service Provider

- a) Ability to understand and react to different types of Customers and their needs.
- b) To be able to provide explanations when things go wrong.
- c) To have the will to succeed and be better at what you do than others.
- d) Knowing what to say and how to say it to achieve the desired results.
- e) Having state of the art technology.

2) Which of the following is the most important part of your job

- a) To leave on time.
- b) To exceed the customers expectations
- c) To generate the income
- d) To be flexible
- e) Sticking to the rules

3) The elements of my behaviour that will generate a positive – Yes I Can image- are:

- a) Using words that demonstrate enthusiasm, action and willingness to help.
- b) Taking ownership of situations.
- c) Providing solutions.
- d) Using body language that sends messages that I am interested and want to help.
- e) Just doing my job.

Read the following scenarios and select which action you consider would be the most appropriate for that situation.

1) A Customer complains that they booked an LCD projector and it has not been supplied. Your conference order shows clearly that they did not book one. Do you:

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- c) Explain that it was your mistake and that you had not been told but you will get one.
- d) Confirm when the Customer needed the projector and let them know that you will get one immediately.

2) A Customer states that they held a conference 1st year at your hotel and has decided to hold the conference in the same venue this year. Do you:

- a) Start by asking question to establish their requirements.
- b) Ask the Customer to hold a moment and explain that you are very busy.
- c) Tell the Customer that you are not sure whether you would have space for the week concerned.
- d) Tell the Customer that you are pleased that they are going to use your hotel again- personalize the call with the Customer and start establishing their needs from them and by using details from the previous conference.

3) You enter a conference room to deliver some additional refreshments that were requested. There are eight people in the room being given a presentation. Do you:

- a) Keep your head down and leave the room as quietly as possible.
- b) Interrupt the group leader and ask if they need anything else.
- c) Look up and give the opportunity for the group leader to make eye contact and ask for anything else.
- d) Reach across the table to clear cups and glasses.

Select whether the statements are negative or positive

Negative	Positive
1. The only room available is the Kings Room	NEG
2. You can up grade the room but is fairly expensive	NEG

3. We have business class rooms available all week	POS	
4. The rules are that you have to confirm the booking within two weeks		NEG
5. You have up to fourteen days to confirm the booking	POS	
6. I can help you with that	POS	
7. We can do that straight away	POS	
8. The room will not be available until 2pm		NEG
9. You must provide us with final numbers by January 10th		NEG
10. I can arrange that it will only take ten minutes	POS	
11. We do not have any 2003 rates		NEG
12. The room is next to the elevator	POS	or NEG
13. Our conditions allow you to-	POS	
14. I don't know how to do that		NEG
15. I will find out for you	POS	
16. The dates we have available are –	POS	
17. I can't		NEG
18. The menu is fairly limited		NEG
19. All I can do is		NEG
20. Yes I can		NEG