CARIBBEAN SMALL HOTEL

Reference Manual

FIFTH EDITION
2003
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ACKNOWLEDGEMENTS

The update and publishing of the fifth edition was made possible through the Tourism Credentialing Program (CTCP) a project of the Caribbean Hotel Association and Inter-American Development Bank (IDB)

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INTRODUCTION

Welcome to the world of small hotel operations and thank you for your interest in the Small Hotel Reference Manual. This fifth edition continues a tradition started over twenty-five years ago when the first edition was published. In recognising that the operational environment of the small hotel is ever changing, with new developments in every sphere of the service industry, the update of the manual becomes an ongoing activity.

The fifth publication is made possible through the OECS (Small Hotel) Demonstration Project of the Caribbean Tourism Credentialing Program (CTCP). CTCP is an initiative of the Caribbean Hotel Association (CHA) with funding from the Inter-American Development Bank (IDB) with Multilateral Investment Funds (MIF). The contribution of American Express a CHA strategic partner, is also to be recognised as they continue to support education and training in the Caribbean hospitality industry.

A number of enhancements have been made to this manual. All the chapters have been updated in keeping with the current needs and operations of the industry and its allies. The manual has been produced in a binder format to allow for future additions plus in electronic format with the addition of a CD. This allows for information to be accessible electronically.

The manual will hopefully be a valuable tool to all small hotel managers and their staff. It is not meant to be the definitive guide on how to run a small hotel, but rather, a collection of insights from some of the region’s hospitality, tourism and business experts, to help you the reader in your day-to-day operations.

There is information on the key departmental areas: front office, housekeeping, and food and beverage. The chapters on Information Technology, Insurance, Marketing, Human Resource Management, Training and Environmental Issues will provide you with invaluable knowledge and assistance.

In the appendices there are several forms commonly used in hotels and other business operations. Many of you may already be using some of these, whilst others we hope will give you insight into how your operations can be run more effectively and efficiently. Feel free to reproduce them for your operation.

This manual is expected to be a reference tool that you will use regularly and share with other members of staff.
Dear Small Hotelier,

It is with great pleasure that the Small Hotels Committee brings to you the 5th Edition of CHA’s Small Hotel Manual.

Since the first edition was published over 25 years ago, this compendium of practical information and perceptive insight into the day-to-day operating problems of innkeeping has helped those of us who have used it to achieve a higher level of success and profitability.

Through the intervening years CHA’s Small Hotel Committee, with the able support of CHTI, has updated and revised the information contained in this manual. We have kept the essential elements, while still adjusting to the changes that continue to impact this dynamic industry of ours.

We urge all hoteliers to use this important publication. We are certain that by doing so, you will save money, become better hoteliers, and in the end enjoy this exciting industry of ours a great deal more.

Respectfully submitted,
The Small Hotel Committee of CHA
Dear Business Partner

It is a great pleasure for American Express to participate in the fifth edition of CHA's Small Hotel Manual. We are proud to be part of this valuable reference tool.

Small hotels play an important role in Caribbean tourism, and we value them highly as business partners.

American Express values our strategic partnership with CHA and looks forward to working with you.

Thank you for your continued support.

Sincerely,
Doria Camaraza
President
Establishment Services Group
Latin America & Caribbean
WHAT IS CHA?
MEMBERSHIP BENEFITS AND SERVICES

HOTEL MEMBERSHIP BENEFITS AT-A-GLANCE

- Marketing and Promotional Support Information at your Fingertips
- Insight on the Latest Products and Services
- Advocacy and Participation in Regional and World Tourism Affairs
- Hotel and Car Rental Discounts
- Medical Discounts
- First Class Training
- Life, Health and Property Insurance Coverage and Consultancy Services
- Publications
- Recognition
- Support to the Future of the Hospitality Industry

Be an active private sector player in the development of this dynamic economic sector. As a member of an industry bent on continued growth and improvement, you profit to the level of your involvement in the opportunities available to you through CHA.

As a CHA member, your role is to be informed and involved.

WHAT IS CHA?
The Caribbean Hotel Association is dedicated to excellence in hospitality, leadership in marketing, and sustainable growth in tourism, to the benefit of its members and that of the wider Caribbean community.

Caribbean Community: Membership, Diversity & Representation.
The members of CHA represent the entire spectrum of the hospitality industry's private sector. More than 1,000 member hotels in 35 national hotel associations represent approximately 114,000 rooms in the Caribbean, from the small guest houses to the mega resorts. The allied members: airlines, tour wholesalers and travel agents, trade and consumer press, advertising and public relations agencies, and hotel and restaurants suppliers, among many, account for more than 700 members in number. Altogether, they are the hospitality industry of the Caribbean, and CHA is their voice.

GOALS
- To be recognised as the leading voice for the Caribbean and Tourism Industry and as the industry's chief public policy advocate.
- To be the members' primary resource for identifying opportunities for physical plant
improvement and environmental management training; being a catalyst for the region’s hotel industry human resource development; providing cutting edge research information related to the hotel and tourism industry.

- To be the recognised provider of enhanced marketing opportunities.
- To be a proactive partner in the strengthening of its regional federation of national hotel associations.
- To be the force for increasing members’ awareness of the successful use of advanced technology.
- To be a proactive force in establishing a greater awareness and understanding of the importance of tourism in the overall economic picture and in cascading the benefits to the people of the Caribbean.
- To operate as a sustainable and financially healthy organisation.

COMMUNICATIONS AND PUBLIC RELATIONS

Member Relations

One of our challenges as a regional organisation is keeping in touch with such a diverse geographic membership base. Hence, we communicate using a variety of different vehicles:

Our internet site, www.caribbeanhotels.org, is an extension of the organisation, providing information about CHA and its members. The site is a user-friendly, electronic communications tool, not only for the membership, but also for the travel trade and consumer public. Members benefit from additional exposure by having their hotel / business’ website hyper-linked to CHA’s.

The CHA advance is an Association topical bulletin distributed by email on a fortnightly basis. It contains current information, statistics on the industry, the market, the region, CHA, and its members. Available in English, Spanish, and French. CHA Digest newsletter provides more in-depth information of CHA news and issues affecting the industry in the Caribbean.
The CHA Handbook is a yearly compendium of industry and association information. It is designed as a comprehensive membership directory and buying guide. Its primary value is to assist hotel managers when purchasing products or contracting services within or outside the Caribbean. For suppliers of goods and services, it is an invaluable advertising and marketing vehicle. The CHA Handbook is published at the beginning of each calendar year by CHA and distributed to members exclusively. The Handbook Addenda is published twice a year.

The Pocket Directory is a condensed guide to CHA active membership (hotels) and available discounts to members, published annually. It is a convenient, compact reference guide when travelling.

In addition, CHA serves as liaison between the industry and the media to generate interest in our events and programs, as well as to increase awareness about the role of tourism in our region’s economy.

**Regional Awareness** - The Caribbean tourism industry is the most important economic activity and principal foreign exchange earner for the Caribbean region. However, there is still a need to increase the awareness of the Caribbean people of the importance of this industry to their economic and social well-being.

To address this, CHA has undertaken a number of initiatives. We have launched "Tourism Talk," a series of monthly print features on Caribbean Tourism for publication in media outlets across the Caribbean. Our goal for the series is to help educate and inform the public on the importance of Tourism to the individual economies of Caribbean States and the Region as a whole. And because we recognise that the Caribbean media can contribute significantly to highlight the positive impacts of tourism and therefore help shape public opinion and policy, CHA and American Express launched in 2002 the annual Tourism Media Awards program to recognise and foster quality reporting of tourism issues in the region. The first Awards will be given during CHIC 2002 in Puerto Rico.

Likewise, CHA has joined its environmental subsidiary, CAST, along with the private development organisation Counterpart International, Air Jamaica, and the Caribbean Broadcasting Union, to kick off the Caribbean Media Exchange on Sustainable Tourism (CMEx), the first of which was held in October 2001, in Ocho Rios, Jamaica. At the closing of the initial CMEx, the consensus among participating tourism representatives and journalists was that the potential for the industry and the media to effectively integrate individuals and communities into tourism is tremendous. It was noted that with additional attention focused on "people-centred" tourism development, Caribbean nationals will be in a better position to understand the personal, national, regional and international importance of tourism.
Publicity Opportunities: In conjunction with Blue Sly Public Relations, CHA produces periodic news releases with discounts and special packages from CHA member hotels across the region, distributed to more than a 1,000 trade outlets.

FOUR STRATEGIC THRUSTS
The principal thrusts of CHA are in Advocacy, Training and Human Resource Development, Product Improvement and Marketing and Promotion. Our Strategic plan provides an extensive range of programs in these main areas.

Advocacy: CHA has an outreach to the global hospitality industry through its affiliation in the International Hotel & Restaurant Association in Paris, and through a strategic alliance with the World Travel & Tourism Council in London. Likewise, as a member of the American Hotel & Lodging Association, CHA has access to the programs of one of the most complete and dynamic national hotel associations anywhere in the world.

At a regional level, CHA has access to the decision makers of the Caribbean tourism public sector through CTO, CARICOM and CARIFORUM.

CHA also benefits from advocacy capacity in Washington DC and Brussels, with a seat on the board of directors of the Caribbean Latin American Action and a voice in the European Union through the Caribbean Council for Europe.

Training & Human Resource Development: For more than 20 years, the Caribbean Hotel Association has been active in the training and education of the Caribbean hospitality work force. For minimal charges, we offer a wide range of seminars and courses.

Product Development: Conscious of the fact that the Caribbean must develop its tourism product to be fully competitive in the global economy, CHA offers a number of programs to improve our product before we market it.

The Caribbean Hotel Foundation awards scholarships and special assistance available for the education of Caribbean hotel industry personnel and students pursuing hospitality careers.

Through CHTI, CHA provides for the development of skills by way of standards, certification and credentialing to address skill shortages.

CHA is the regional ambassador to the Global Travel & Tourism Partnership (GTTP), a program that offers a unique tourism education experience to secondary level students.

Similarly, Hello Tourist! is a tourism awareness program for 6th graders or equivalent. By educating children about the importance of tourism to their local economy, ‘Hello, Tourist!’ creates greater awareness as to how the community can benefit from a sustainable tourism product.
CHA has established itself as THE private sector developmental agency for the Caribbean hospitality industry. The European Union is set to approve a US$2.9 million dollar grant, earmarked to fund product development initiatives for our Caribbean hotels. This is a huge step forward for the hotel sector.

**MARKETING AND PROMOTION**

That one little word -- marketing -- covers a lot of ground these days. CHA is always eager to find new networking and distribution outlets for its members.

CHA continues to play an active role in spearheading the regional marketing program. An independent trust, the CHA Charitable Trust, was formed on September 1st, 2001, and now has 21 private sector members consisting of major chain hotels operating in the Caribbean, independent hotels, hotel associations, and industry partners. In addition, 166 CHA member hotels have already become members of the regional campaign. Private sector members must be members of CHA in order to join the regional marketing program.

Caribbean Marketplace is the single most important tourism marketing meeting in the Caribbean. It offers hotel members a unique and effective one-stop forum for meeting and negotiating contracts with more than 400 wholesalers and tour operators from North America, Europe, South America and the Far East.

The Caribbean Hotel Association Reservation Management Service (CHARMS) brings to CHA member subscribers an effective and cost-efficient electronic booking tool with global access to ALL major electronic reservations systems. In 2001, CHARMS produced a total of booked revenue of more than US$7 million in revenue for its member hotels, having sold more than 56,000 room nights at an average rate of US$128 dollars.

CHA also plans and manages a number of marketplace-type events for our member countries: JAPEX, the Jamaica Product Exchange; DATE, in the Dominican Republic; and SMART, for the northern Leeward Islands.

**GOLD BOOK PUBLISHING**

Gold Book Publishing, a division of the Caribbean Hotel Association, is the Caribbean region's Number 1 tourism publisher - and has been for more than 20 years. Consisting of a team of publishing professionals based in Miami, Gold Book Publishing offers excellent opportunities to tourism marketers with an array of established trade and consumer products:

- The Caribbean Gold Book - the travel agents' most comprehensive reference source to the lodging industry in the region. Containing more destinations, lodging and web site information than any other Caribbean trade publication. More than 33,000 copies - 280 Pages - distributed to ARC member travel agents twice a year.
The Caribbean Travel Planner - a twice annual consumer title published in partnership with Caribbean Travel & Life. Designed to guide the leisure traveller planning a Caribbean vacation, the Planner showcases 36 Caribbean destinations falling within the CHA and CTO footprint. 400,000 copies distributed every year (100,000 sold on newsstands; 300,000 distributed to select American Express Card members).

Caribbean Meetings & Events Program - a new reference source for meetings, conventions and events facilities within the Caribbean, from small executive retreats to the largest conference centres. An annual directory plus monthly E-newsletters and a fully searchable web site directed to a uniquely qualified Meeting Planner database.

The Caribbean Hotel Association's Handbook - A yearly compendium of information on the Caribbean Hotel Association, its member benefits and services and various annual events. The industry's official colour "buyer's guide" bringing suppliers and buyers together.

Destination Planners - Gold Book Publishing has extensive experience in producing individual destination planners in a variety of languages.

For more information, or to book an appointment with your sales professional, call MIAMI: 305-443-5900, or E-mail: jillian@goldbookpub.com

PUBLICATIONS
A number of publications function as vehicles for CHA to serve its members.

Hotel Construction and Modernisation Report. This publication provides information of hotel developments in CHA member countries: proposed constructions, refurbishments and expansions. Updated every two months, the Report is available online for CHA members only.

Hurricane Preparedness Manual. This essential publication was produced in conjunction with CTO, largely through donations from American Express and IH&RA's Fund for the Future. The manual covers preparedness and damage control, readiness during the passing of a hurricane, and post-disaster mitigation and recovery. It offers advice on guest and property safety and security, insurance coverage, and disaster communications. Due to the Caribbean’s vulnerability to hurricanes, the Hurricane Preparedness Manual is an essential publication.

Caribbean Small Hotels Reference Manual. Written and edited by experienced Small Hotel Operators and the staff of CHA and CHTI, this manual is a basic, hands-on practical guide to housekeeping, food & beverage, marketing, purchasing, and other essential elements involved in the effective management of a small property in the Caribbean.

Resources Published by the Caribbean Alliance for Sustainable Tourism (CAST):
- Technical Resource Directory for Caribbean Hoteliers - Includes buying specifications for environmentally sound technologies and suppliers as well as a listing of environmental organisations working in the Caribbean Region.

- Best Practice Case Studies - A publication with case studies of hotels and marine parks which have won the American Express / CHA Environmental Award. Also includes recommendations and methods for achieving environmental excellence.

- Environmental Toolkit - A guide to reducing water, toxic chemical and energy use, reducing waste and other environmentally sound tips. Available in English and Spanish.

- The BroadCAST Newsletter Subscription - 6 issues per year keep our membership aware of industry activities and environmental news.

- Health and Hygiene in Hospitality: A Guide. This publication created by the Pan American Health Organisation (PAHO) specifically for the hotel industry, can be used as a quick reference guide for managers and staff. It focuses on safe public health practices and addresses major potential health hazards faced by any size hotel. Four booklets included.

Produced by the Caribbean Culinary Federation (CCF):

- Apprenticeship Operations Manual. This publication provides detailed guidelines on how to establish an apprenticeship program. It is useful both for destinations and for individual establishments.

- How to Conduct a Food & Beverage Competition Manual. The manual provides simple and flexible, step-by-step recommendations on how to handle the basic aspects in the coordination of a food & beverage competition. The manual is based upon the “A Taste of the Caribbean” regional culinary competition, coordinated by CCF. The guidelines have been developed taking very much into account their capacity to be adapted to different competition sizes, establishments, and organisations. Some core aspects explained include competition formats and categories, registration and rules, judging criteria, complementary activities, budget considerations, and others.

- Culinary Occupational Standards Manual. This manual provides simple and flexible guidelines on what constitutes core competencies for kitchen operations. It details key performance standards and tasks applicable to various culinary positions, regardless of the size, style, or location of the operation. The guidelines have been developed taking into consideration the realities of small hotel and restaurant facilities, in which employees have to play multiple roles and tasks.

- Video Set on Contemporary Caribbean Cuisine. Produced from footage recorded during “Taste of the Caribbean,” the acclaimed regional culinary competition, the videos depict six leading chefs preparing their favourite Contemporary Caribbean Cuisine dishes, while passing
on a variety of useful tips. These videos are a must for anyone wishing to learn more about Contemporary Caribbean Cuisine and make a perfect gift for friends abroad.

EVENTS

CHA holds a number of industry events annually that provide a forum to bring together all sectors of our membership and the industry at large to stimulate information sharing and networking among them. Caribbean Marketplace is the leading Caribbean tourism marketing event of the year, with more than 500 buyers (Tour Operators, Wholesalers, Corporate and Incentive Meeting Planners, and Charter Operators) from around the world who meet with Caribbean suppliers (CHA Member Hoteliers in good standing, Ground Tour Operators, Airlines, Car Rentals, Government Tourist Boards and Promotion Boards), as part of a program of computerised business appointments.

- Caribbean Hotel & Tourism Investment Conference. A conference designed to be a tripartite meeting between government, industry and the investment community, with the specific objectives of: improving the tourism investment and operating climate across the region; making the investment community aware of the development opportunities available in the Caribbean; and stimulating a continuing flow of both equity and loan capital into the region. Ministers of Finance and Tourism, Caribbean Prime Ministers, senior executives of the hotel and airline industries, and top-level decision makers in the investment community gather to share their thoughts on how to spur additional investment into the Caribbean Tourism Industry. Held in the Spring.

- Caribbean Hotel Industry Conference (CHIC). CHA’s annual June convention is the Association’s premier event, presenting its hotel and allied members with a forum for the exchange of information and ideas, for the conduct of Association business, for networking, the making of new business contacts and renewal of old acquaintances. Each year it draws more than 1,000 delegates. The event is designed to inform, educate, benefit and entertain its members. The educational component of CHIC features general sessions and workshops led by experts in many fields affecting the tourism industry. It includes mini-chat sessions and round tables for one-on-one conversations with specialists in a range of fields, such as management and administration, operations, marketing and finance. At this 100+ booth trade expo, held in conjunction with the Conference, suppliers display the latest in products, services and technology. Hoteliers have a one-stop shopping facility where they may try new wares and negotiate their best deal for all their hotel needs. Exciting social functions and golf and tennis tournaments complete CHIC’s program.

- “A Taste of the Caribbean.” This is the
premier food and wine festival in the region, combining demonstrations, tastings, seminars and workshops led by world renowned experts. Expand your horizons and improve your culinary skills. Not just for professional chefs and cooks, ‘A Taste of the Caribbean’ is a gastronomic event for those that appreciate good cuisine, good wine, and even a good cigar. Held annually.

- Crystal Palm Awards. Europe is an important, ever-increasing marketplace for the Caribbean. In celebration of its 35th anniversary in 1997, CHA inaugurated the “Crystal Palm Awards for Excellence” to honour the Caribbean’s leading travel partners in the United Kingdom and Europe. The Crystal Palm Awards is presented annually in Europe at a gala evening, bringing together the top European travel companies, trade and consumer press, and CHA members.

- Small Hotels Retreat and Trade Show. A custom-designed conference that addresses the specific needs and concerns of hotels with 75 rooms or less, which represent two thirds of CHA’s hotel membership. It features round table discussions and a table-top trade exposition for allied members. In 2002, Small Hotels Retreat was successfully incorporated into CHIC 2002, combining the intimate atmosphere of camaraderie of Retreat with the impressive lineup of international speakers featured at CHIC.

- Small Hotels Study Tour. The CHA Small Hotels Subcommittee organises tours for Caribbean hoteliers to different parts of the world with a specific educational purpose. The tours offer tremendous learning experience from industry colleagues around the globe and help foster a feeling of camaraderie between Caribbean small hoteliers.

- Leadership Conference. A two-day management seminar held each fall for the benefit of elected presidents and paid executives of member hotel associations. It focuses on improved association management skills through the participation of guest speakers and group discussions with a view to strengthen the hotel associations that are part of the CHA federation.

DISCOUNTS
CHA membership entitles cardholders to discounts offered by more than 500 fellow CHA member hotels in the Caribbean, and others in North America and Europe. In addition, worldwide discounts are available to you through Hertz. The CHA Pocket Directory provides members with a compact listing of these discounted rates and also serves as a convenient guide when travelling.

CARIBBUYS.COM
CHA’s new e-procurement web site, CaribBuys.com, where hoteliers can purchase quality hospitality products and services at discounted prices. Through CaribBuys.com, CHA offers a virtual marketplace to its hotel members with access to hundreds of quality products at discounted prices 24 hours/7 days a week. With CaribBuys.com, it is easier than
ever to find what you need with just a click of a mouse. To learn more or to get registered, visit www.caribbuys.com

RESOURCES CENTRE
CHA can provide its members with information on fees, tourism awareness programs, taxation, incentives, and other aspects relevant to the Caribbean tourism industry.

INSURANCE PROGRAMS AND CONSULTANCY SERVICES
Through its subsidiary, the Caribbean Hotel Association General Agency (CHAGA), CHA provides top-of-the-line life and health insurance programs for all staff levels, executive, middle-management, and general staff. And to provide hoteliers with professional counsel on how to maximize their insurance claim, should their property suffer a major loss, CHAGA has made arrangements with the reputable firm of international insurance loss adjusters Smith, Orloff & Associates. Their disaster recovery team includes highly proficient insurance experts, engineers, accountants, and lawyers who specialize in the hospitality industry.

CHA SUBSIDIARY COMPANIES
Caribbean Alliance for Sustainable Tourism (CAST)
The Caribbean Alliance for Sustainable Tourism (CAST) is the CHA's environmental arm. Founded in 1996, this dynamic, wholly-owned subsidiary is an industry led initiative and a tri-partite agreement between CHA, the International Hotel Environment Initiative (IHEI) and Green Globe 21. With over 200 active members, CAST provides high quality training, publications and technical, hands-on services for Caribbean hotels and businesses. CAST services and activities focus on the reduction of operational costs and the preservation of the region's resources through environmental efforts in hotel management. Through education and training, CAST seeks to educate and develop the practices of the region's hoteliers, and promoting their efforts to consumers world-wide. Year after year, CAST is voted one of CHA's most valuable services by CHA members themselves.

Chairman
Royston Hopkin, CMG
Senior Environmental Specialist
Deirdre Shurland
Director of Communications
Heather Crawford
National Coordinator, Dominican Republic
Ainoa Luna

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CARIBBEAN CULINARY FEDERATION (CCF)
The Caribbean Culinary Federation, as the preeminent professional food and beverage association in the region, seeks to identify
and develop Caribbean Cuisine, with the twin purposes of enhancing the marketing capability of the region, based upon its rich heritage and culture, and improving training opportunities for professional development available to Caribbean nationals in the food and beverage industry.

The Federation, founded in 1994 at the Caribbean Hospitality Industry Conference, is a non-profit organisation, and acts as the culinary arm of the Caribbean Hotel Association.

Since its founding, the Federation has contributed to culinary excellence in the region through the celebration of various culinary competitions, where chefs, apprentices, waiters, and bartenders from the different Caribbean destinations, have demonstrated their professional abilities and creative skills.

The Federation focuses on providing educational, marketing, and networking opportunities both to professionals and consumers, as well as services and products that can help maintain high quality service standards in food and beverage operations. It also coordinates activities and events that help attain its strategic goals.

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CHA Liaison: Wanda Piña-Ramírez, Product Development Department  
Email: wpina@caribbeanhotels.org

CARIBBEAN HOSPITALITY TRAINING INSTITUTE (CHTI)

The Caribbean Hospitality Training Institute is a not for profit organisation registered in the Cayman Islands, dedicated to the training and development of those working in the hospitality industry. The Board of Trustees oversees and advises on training needs for the membership and the industry at large, and the training provided by CHTI.

Since the establishment of a Human Resources Department in 1998, the scope of the activities that are overseen by the Board has expanded to cover all human resources issues, such as recruitment, careers, training / development, and assessment and appraisal.

The Board comprises representation from hoteliers, educators / trainers, and human resource specialists. Work is currently being undertaken to integrate all human resource activities under the umbrella of the Board. The Board seeks to expand the representation of the members committed to the development of the region’s human resource capacity.

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CARIBBEAN HOTEL ASSOCIATION GENERAL AGENCY (CHAGA)

This wholly owned subsidiary provides top-of-the-line life and health insurance programs for all staff levels, executive, middle-management, and general staff. Programs are offered through AMEDEX Insurance Group, a leader in its field throughout the Caribbean and Latin America.

And to provide hoteliers with professional counsel on how to maximize their insurance claim, should their property suffer a major loss, CHA has made arrangements with the highly-reputable firm of international loss adjusters, Smith Orloff & Associates, to assist them in their dealings with the insurance company.

These programs and services are administered by Joe Murray of Saldaña & Associates, Inc., CHA’s long-time insurance advisor.

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Website: www.caribbeanhotels.org/cha/subsidiaries/CHAGA.htm

CARIBBEAN HOTEL ASSOCIATION RESERVATIONS MANAGEMENT SYSTEM (CHARMS)

CHARMS is the official reservation service developed by CHA. Currently, CHARMS is owned and supported by CHA and operated by Utell.

Travel agents can make reservations for their clients through CHARMS in one of the following three ways:

- Accessing the toll free number, 1-800-74-CHARMS (1-800-742-4276) which is available in North America;
- Contacting one of the Utell offices worldwide;
- Using the following Airline Global Distribution Systems: Sabre, Apollo, Amadeus, and Worldspan;
- Accessing one the following websites: Hotelbook.com and Travelweb.com.

In 2000, CHARMS generated close to US$7 million in business for its member hotels in 40 Caribbean destinations, at an average rate of $131.26 a night. Membership in CHARMS is open to CHA-member hotels only.

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CARIBBEAN HOTEL FOUNDATION

The Caribbean Hotel Foundation is a not for profit foundation registered in the Cayman Islands with 501C3 tax status, which allows it to be the recipient for funds which support its aims and objectives from US-registered corporations on a tax-free basis.

The Foundation is best known for its fundraising through the CHA Foundation Auction at the Caribbean Hotel Industry Conference (CHIC). It also receives donations from American Express and the Caribbean Culinary Federation. Annually, the Foundation disburses scholarships to support the education and training of Caribbean nationals who seek professional qualifications and to upgrade their skills and knowledge in the tourism and hospitality field. In 2001, the Foundation awarded $56,000 in scholarships.

The Foundation is currently embarking on a capital development campaign with a view to increasing its funding and broadening and extending the scope of its activities to the benefit of the Caribbean region. The Board of Trustees oversees the activities of the Foundation.

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CARIBBEAN TOURISM CREDENTIALING PROGRAM (CTCP) COUNCIL

The Council was established in 1998 as mandated through CTCP to oversee and advise on the implementation of the CTCP and to approve regional standards / certification for the region’s hospitality industry.

CTCP, which is funded by the Multi Lateral Investment Fund of the IDB, with substantial counterpart funding from the industry, seeks to establish a Regional Credentialing Program. Initially established to oversee the implementation of the program in Barbados, Bahamas, Jamaica, Trinidad & Tobago, and the OECS, the Council will continue to ensure that the certification and credentialing system is made available to as many CHA member countries as possible.

The program is being executed by CHA, CCF, CHTI, and ACTI (The Association of Caribbean Tertiary Institutions), through a Project Execution Unit in Barbados.

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In the Caribbean, we are ALL tourism – and Tourism is our Future. At CHA, we are proud to have a leading role in helping to shape and ensure the future of our industry.
WHAT IS CHTI?
THE CARIBBEAN HOSPITALITY TRAINING INSTITUTE

The Caribbean Hospitality Training Institute is a non-profit organisation dedicated to training and education within the Caribbean hospitality industry. The Caribbean Hotel Association, the Institute’s parent organisation, which has been in existence since 1962, addressed the region’s training needs in many of its group discussions and functions until it became evident that a separate organisation had to be created to undertake full-time hospitality training. Incorporated in 1980 in the Cayman Islands, CHTI has been a successful operation for a period of twenty three years, though its unofficial history dates back another decade. In an industry of international scope, CHTI realised that its main mission would be to bring the Caribbean work force up to the international standards required to give the region a competitive edge in the global marketing of its hospitality product.

CHTI sees its role for the future in not only continuing to ensure its current endeavours but forging new ground.

The standardisation in the delivery of hospitality training is a major concern. Raising standards within the region and to control the quality of training brought into the Caribbean.

Taking responsibility, CHTI in conjunction with the IDB set standards and certification for the Region. Now we can plan our own future.

To this end CHTI is heavily involved with and sponsors initiatives such as the Caribbean Culinary Federation which will oversee a Regional Apprenticeship Program and develop a professional regional cook book. This body also has the role of identifying and assisting in the delivery of Caribbean Cutting Edge Cuisine.

OUR MISSION
To provide quality Human Resource development, services and training that our members can benefit from by improving the quality of their services through the improved skills and education of their employees.

To establish an industry-driven, integrated system of Human Resource Development which meets the needs of, and creates a seamless system of Education and Training for the Caribbean Hotels and Tourism Industry.

OUR VISION
To be the primary hospitality educational and training institution in the Caribbean. We are devoted to providing knowledge,
expertise, counsel and support to all industry constituents who “make up” the community we serve.

VALUES
- Respect
- Service excellence
- Integrity
- Commitment
- Partnership
- Learning to learn

SERVICES
CHTI is a mobile training unit conducting training for: hotel associations; individual hotels; as well as the general hospitality industry community, including taxi drivers, retail establishments, bank employees, customs and immigration officials, and restaurant staff, to name but a few. CHTI offers a variety of programs and is adding new ones continuously to meet the changing needs of our industry.

CHTI’s training is customised and developed to suit the specific needs of the client. CHTI’s core curriculum is then adapted and tailored to match the client’s specific managerial philosophy, policies and procedures, barriers and limitations, and any other special considerations or inside points of view that deserves consideration when organising effective staff development programs. CHTI begins with a client’s needs assessment and concludes with a formal written report including a one-on-one consultation with management. CHTI believes that the continuity and consistency of training over time produces maximum benefits and measurable results in the form of improved product quality & service. CHTI can assist in the formulation of long-term plans and strategies for improved skills, attitudes and service behaviour.

CHTI has designed training schemes for hotels with a staff of three, and also planned and delivered programs for resorts with over 500 personnel. The industry is evolving and changing rapidly and CHTI is constantly assessing and updating its portfolio of services to meet the human resource development needs of the Caribbean region.

RESEARCH
CHTI maintains a library of textbooks, periodicals, surveys, trends, publications, and journals for research purposes and provides information for the industry upon request.

SEMINARS AND WORKSHOPS
Training programs are offered in multiple subject areas. These programs are flexible to meet staffing needs, and course content is custom-designed to meet specific operational & cultural requirements.

One-and two-day workshops are also scheduled throughout the region, and offer a variety of topics from which to choose. Excellence Together, Winning Over the Customer, Managing Quality Service, Supervisory Skills are just a few examples of short-subject workshops that are developed and offered upon request or scheduled in the region during the year.
Consultancy
CHTI offers technical assistance and advisory capabilities to address specific tasks and directives from owner/operators, particularly the small hotelier. CHTI’s consultants begin as “mystery guests” and conduct a confidential operational audit to experience first-hand guest service levels. These specific observations are utilised and referred to during focused training modules while working on-the-job with staff. The team works with management and makes operational, policy, and procedural recommendations by formalising action plans to enrich and enhance the working environment.

CHTI has the depth of resources to satisfy any request and can mobilise resources to initiate action in a timely fashion.

Management Interaction Sessions
These seminars are designed to lead and facilitate management discussion and interaction. Strategic planning, organisational effectiveness, team building, communication and image enhancement are examples of topics targeted. Customised agendas are developed to suit specific needs to attain desired results.

Scholarships
CHTI administers many scholarships that are available for staff at CHA hotels. American Express sponsors the Annual Employee, Supervisor, and Supervisor of the Year Award ceremonies take place at CHIC and winners receive a trophy and US$ 500.00

Small Hotels Manual
A complete manual has been designed for hoteliers to operate the small hotel. Front office procedures, accounting/reporting forms, and Food & Beverage marketing techniques are examples of chapters in this complete reference guide, designed to aid in the establishment of standards for the professional hotel and resort operation.

Certification
Professional Certification for Caribbean Tourism Workers.

CARIBCERT is a standards and certification system built “By the Industry and for the Industry”

A skill and knowledge development and professional recognition program that is designed to be started and completed on the job, based on CARIBCERT occupational standards for 45 tourism occupations as follows:

Food & Beverage
Line Level: Host/Hostess, Bus Person, Junior Waiter, Senior Waiter, Bartender, Bar Assistant, Cashier, Snack Bar Attendant, Banquet Porter, Room Service Bus Person, Room Service Server, Room Service Order Taker/Cashier.
Supervisor/Supervisory/Manager: Food Service Supervisor, Beverage Service Supervisor, Room Service Supervisor, Food and Beverage Manager

Housekeeping
Line Level: Houseman, Room Attendant
Supervisory/Manager: Housekeeping Supervisor, Executive Housekeeper.
**Food Preparation**  
**Line Level:** Cook, Pastry cook, Bakery cook, Butcher, Garde mange, Cooks’ Helper/Assistant, Steward  
**Supervisory/Manager:** Food Preparation Supervisor, Steward Supervisor, Chief Steward, Executive Chef.

**Front Operations**  
**Line Level:** Reservations Agent, Front Desk Agent, Concierge/Guest Services, Agent, Bell Person, PBX Operator, Night Auditor, Valet Parking Attendant, Hotel Driver, Environmental Coordinator.  
**Supervisory/Manager:** Front Desk Supervisor, Reservations Supervisor, Bell Captain, PBX Supervisor, Transportation Supervisor, Front Office Manager, Rooms Division Manager.
American Express Travel Related Services Company, Inc. is a diversified travel and financial services company founded in 1850. It is a leader in charge and credit cards, Travelers Cheques, travel, financial planning, investment products, insurance and international banking. American Express operates throughout the Caribbean region, offering a wide range of services to residents, tourists, businesses and governments both directly and through a regional network of representatives. For both leisure and business, American Express actively promotes travel to the Caribbean from the United States and international locations. In a time of dynamic growth in the tourism industry, American Express continues with its ongoing commitment to its business partners and the Caribbean. The following programs are part of American Express’ determination to invest in this region, its heritage and its people.

THE OFFICIAL CARD PROGRAM
This innovative marketing strategy, which began in 1985, allows American Express and the participating Governments of Caribbean countries to pool together financial and marketing resources to generate increased tourism and stimulate visitor expenditures. The program includes training for the hospitality sector, value-added promotions for visiting Cardmembers, public relations efforts, signage, and inclusions in marketing programs. Official Card Countries in the Caribbean include Anguilla, Antigua, Aruba, The Bahamas, Barbados, Bermuda, The Cayman Islands, Curacao, The Dominican Republic, Jamaica, St. Maartin/St. Martin, Puerto Rico and the United States Virgin Islands.

CARIBBEAN REGIONAL MARKETING CAMPAIGN
American Express has committed funds to the Caribbean Regional Marketing Campaign for the development, launch and implementation of the first-ever comprehensive Marketing Campaign for the Caribbean. Launched in August 2002, the CHA member countries joined together to promote themselves as a single destination, and American Express is proud to be on of its first strategic partners and key sponsors of the campaign.

TRAINING
American Express and the Caribbean Hospitality Training Institute have worked closely together for many years to provide
training to the hospitality industry in the Caribbean. Our goal is to build upon this foundation and increase the value of CHTI training by implementing a specialised training curriculum for hospitality and related industry employees entitled “Excellence Together,” which focuses on Service Quality. American Express is also a sponsor of the Hurricane Awareness Workshops and Manual.

HOSPITALITY AWARDS
American Express is committed to the success of the Caribbean region and is proud to actively support the Caribbean Hospitality Industry by recognising the achievements of the tourism employees in the Caribbean. American Express is proud to be the founding sponsor of the following Awards:

- American Express Green Hotel Award
- The Betty Sperber Award
- The Tony Mack Award
- Large Hotel Association Executive Award
- Small Hotel Association Executive Award
- Caribbean Tourism Media Award
- Character of the Year
- Employee of the Year
- Supervisor of the Year
- Allied Member of the Year

In addition to the awards, American Express is a partner in offering scholarships to the Supervisor and Employee of the Year.

CARIBBEAN ALLIANCE FOR SUSTAINABLE TOURISM (CAST)
American Express is proud to be a strategic partner and member of the Governing Council of CAST, the environmental arm of the Caribbean Hotel Association. American Express supports CAST’s mission in “Keeping the Caribbean Clean, Green and Pristine for Future Generations.” Through the efforts of CAST, the Caribbean is widely recognised as a leader in the adoption of environmentally responsible practices in hotel operations and has the greatest number of Green Globe 21 certified hotels in the world.

American Express is proud to be a Strategic Partner of the Caribbean Hotel Association to further the development of tourism in the Caribbean.

WHY YOUR CLIENTS PREFER THE AMERICAN EXPRESS CARD
American Express Cardmembers have no pre-set spending limits on the Card, allowing for extensive travel and significant expenditures. To encourage travel to the Caribbean, American Express frequently offers travel advice and suggestions in newsletters sent to over 20 million U.S. and 31 million worldwide Cardmembers.

Cardmembers visiting the region can visit our local Travel Service Representative offices and enjoy unparalleled services, such as: tours, travel and financial assistance (American Express Card®, American Express® Travelers Cheques and refunds, foreign exchange, emergency cash, emergency Card replacement), and other travel related assistance. Travelling with
American Express means travelling with security. American Express, along with you, the hotelier, provides a “home away from home” to all Cardmembers.

American Express has a variety of options for the exchange of Cardmember inquiry information with you. In addition, to the traditional paper by mail method, you might be able to receive and respond to inquiry claims and chargeback using our Internet Service, Online Merchant Service. Currently this Internet Service is available for Puerto Rico and USVI. The Internet service allows you to reconcile your payments and resolve disputes on the Internet. If you are not already enrolled, enroll today by visiting the American Express web site at: www.americanexpress.com/service

Special programs such as Assured Reservations and CARDeposit ensure that Cardmembers will have a worry-free lodging experience. With the CARDeposit program, Cardmembers can charge the hotel deposit to their Card upon making a reservation, and then receive confirmation directly from the hotel. American Express will abide by the Cancellation Policy of each hotel. Your program responsibilities include the following:

- At the time the reservation is made, advise the Cardmember that in the event of cancellation, the reservation must be cancelled by the time specified in your cancellation policy. You must notify the Cardmember of the amount that will be billed for failure to show up without cancelling the reservation by the cancellation deadline.
- If the Cardmember cancels, provide a cancellation number to the Cardmember and maintain a record of the cancellation number.
- Use the proper “no show” descriptor, when submitting a “no show” charge or transmit the appropriate “no show” descriptor on the charge data.

Failure to honour the Assured Reservation program requirements obligates you to do the following for the Cardmember:

- Pay for one night’s accommodation at a comparable property, located nearby.
- Pay for transportation to the alternate location.
- Pay for a three-minute telephone call.
- Forward all communications to the Cardmember at the alternate location.

Lodging Merchants may submit charges for deposits, if they comply with the terms of the CARDeposit program. Your program responsibilities include the following:

- You must forward written confirmation of the reservation and details of your cancellation policy to the Cardmember within three (3) days after the reservation is made.
- Upon arrival the Cardmember must show the Card.
- You must ensure that the record of the CARDeposit includes the Cardmember’s name, address, Card number, expiration date, scheduled arrival date and the last
date by which the Cardmember may cancel without penalty.

- For each CARDeposit, you must complete a Record of Charge with the word “CARDeposit” on the Cardmember signature line. You must also indicate the scheduled arrival date on the Charge Record.

If you are unable to honour a CARDeposit, your obligation to the Cardmember includes the following:

- You must pay for accommodations at a comparable location nearby, until the original reservation expires (up to 14 days), or until accommodations become available at the original location, whichever occurs first.
- You must provide transportation to and from the alternate location once a day.
- You must pay for two phone calls (one 3-minute call to advise of the move to the alternate location, and one 3-minute call to advise of the return to the original location).

For all charges you must:

- Complete a Charge Record as described in your Card Acceptance Agreement.
- Verify that the Card is not visibly altered or mutilated.
- Verify that the Card is signed in the same name as that embossed on the front of the Card.
- Obtain an authorisation approval code from American Express, regardless of the dollar amount. Authorisation approval codes will be valid for thirty (30) days.

**Step 1. Swipe the Card or take an IMPRINT.**

If you process electronically and the magnetic stripe is unreadable and you have to manually key the transaction, an IMPRINT of the Card must be taken to validate Card presence in that transaction.

**Step 2. Obtain Card Authorisation.**

You must obtain an approval code for each transaction.

**Step 3. Verify that the Customer is the Cardmember.**

The American Express Card is not transferable. Only the Cardmember may use the Card.

**Step 4. Verify the Card’s valid date.**

The Card may not be used after the last day of the last month embossed on the front of the Card.

**Step 5. Match the embossed number on the front of the Card to the number on the back of the Card and the terminal receipt.**

If a different number appears on the
terminal receipt, this could indicate that the Card has been altered. Call American Express Authorisations at 1-800-528-2121 and immediately state that you have a “CODE 10.”

Step 6. **Compare the Customer’s signature on the terminal receipt with the signature on the back of the Card.** Make sure that the signature reasonably matches the signature on the back of the Card and is the same as the name embossed on the front of the Card.

Step 7. **Compare the name that prints out on the terminal receipt to the name embossed on the front of the Card.**

If the name that prints out on the terminal receipt is different from the embossed name, call American Express Authorisations at 1-800-528-2121 and indicate that you have a “CODE 10.”

**TRAVELERS CHEQUES ACCEPTANCE**

**JUST THINK CASH….Easy to Use... Easy to Accept**

- American Express Travelers Cheque users, on average, spend 31% more on lodging expenditures than non-users when travelling internationally.
- American Express Travelers Cheque users are more likely to make expenditures at moderately priced restaurants and, on average, spend 22% more than non-users.
- American Express Travelers Cheque users, on average, spend 12% more on retail expenditures than do non-users when travelling internationally.
- American Express Travelers Cheques users are more likely to make expenditures at souvenir stores and, on average, spend 28% more than non-users.
- American Express Travelers Cheque users are more likely to make expenditures at specialty stores and, on average, spend 10% more than non-users.

When you see American Express Travelers Cheques, just think of them as cash.

Simply follow the “Watch & Compare” procedure when a Cheque is presented, and payment is guaranteed when the signatures are a reasonable match.

**There is no contract to sign.**

**WATCH & COMPARE**

- **WATCH** your customers countersign in the lower left corner of the Cheque
- **COMPARE** the countersignature with the signature in the upper left corner.
- **Payment is guaranteed** when the signatures are a reasonable match.

**Transaction Concerns?**

Call the Travelers Cheques Authorisation Centre

Anguilla, Antigua, Bahamas, Barbados, Bermuda, Jamaica, and USVI: **1 800-221-7282**

Cayman Islands, Grenada, St.Kitts & Nevis, St.Lucia, Trinidad & Tobago, BVI: **1 800-828-0366**

Other Caribbean Islands, call collect **1-801-964-6665** 24 hours, 7 days a week.
For information regarding payments dial 1-800-528-5200 or collect 525-326-2690.

To obtain approval codes for voice authorisations or electronic referrals dial 1-800-528-2121 or collect 525-326-2533.

For support of American Express terminals dial 1-800-805-0076 or collect 336-760-8120.
Restaurants

Reserved Tent Card
#21646
5” x 3 1/4”
100 per restaurant

Today's Special Cards
#21645
4” x 2 1/4”
100 per restaurant

Our Chef Suggests Cards
#21644
4” x 2 1/4”
100 per restaurant

Folded Double-Panel Check Presenter
#21660 (black)
5” x 9 1/2”
1 per table

Single-Panel Check Presenter
#5F080 (black)
5” x 9 1/2”
1 per table

All Industries

Business Hours Decal
#21633
6 1/4” x 6 1/4”
2 per establishment

Business Card Holder
#21673
7” x 1 1/4”
1 per counter

Cards Welcome Decal
#21631
3 3/4” x 5 1/2” (large)
#21630
2 1/2” x 3 3/8” (small)

Pull/Pull Door Decal
#1024
5 3/4” x 4 1/2”
2 per door

Multicard Decal
Horizontal #25105
Vertical #21628
2 per establishment

Cards Welcome Plaque
#21634
3” x 4”
1 per counter

Cards Welcome / Travelers Cheques Decal
#21631TC
7” x 3 1/4”
Signage Material Order Form

Use this form to place your order. Indicate with a check mark the items you would like to request, making sure to note the quantity of each item. Complete the form with all of your business’ pertinent information and send it by fax to (787) 758-4815. You should receive your items within 15 days of receipt of your order, free of charge.

Business Information: 
Name: ________________________________
American Express Business Number: __________________
Mailing Address: ________________________________
Phone: ________________________________
Date: ________________________________

Please check the items you need as well as the quantity:

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CHAPTER ONE

THE SMALL HOTEL MANAGER
THE SENSE OF HAVING ARRIVED

The marketing edge of every small hotel should be its uniqueness. This manual assumes you have purchased or built your property and it is open. We would like to suggest that it is time to experience the sense of arrival that a guest feels.

The moment of arrival sets the tone for the guest’s vacation. It is the time at which they make their crucial first judgements. Take the time to walk beyond your front gate, and view once again as if for the first time, your property. Also have a friend or family member do a walk-through for the first time, as they may be able to spot something you missed.

The hotel should reflect both your philosophy, and the environment in which it sits. Harmony should be the most welcoming inanimate product. As you walk down your drive and through the reception area, walk as though with new eyes, and sense how the property comes together. It should capture the best of your location and allow this to permeate the property.

In its unique way your property must say what hotels and inns have always said: comfortable, clean, happy, safe - welcome!

THE HIERARCHY OF HOSPITALITY

- The Guest
- The Front Line Staff
- Supervisors
- Managers
- Owners

How Does That Feel?

MANAGING THE SMALL HOTEL

As the leader of this facility, you must provide leadership. Managers manage, that is, they control the status quo. Leadership moves your people forward, enabling them to create the hotel you wish to have for your guests.

You must have a vision and you must communicate that vision to everyone who surrounds you:

- Write a mission statement
- Break it down into achievable goals
- Talk about your goals and get the staff to measure their success.
- Use your vision and goals as the basis for making your daily decisions on marketing and training.
- Your staff *is* the hotel. Your job is to give them the tools to be effective.

HOW DOES THAT FEEL?

We can only reap the benefits of our success through empowering others to achieve the
goals of the organisation. Leadership, strangely, requires that we often stand quietly at the rear. You will only ever be in one place at a time, and without your whole staff focused on the guest, you cannot be successful in “zero defect” guest satisfaction.

Inspired staff delivering high quality, warm and welcoming service and hospitality in unique surroundings bring guests back.

As the key person in the small hotel, you must be very visible; you must walk the walk, and talk the talk.

If you share your vision with your staff, you must demonstrate it. It’s vital that they see you as the personification of all that you wish them to be. When you discuss with them shortcomings, refer back to your goals and vision and place your comments within that framework.

As the key person in the small hotel, you must be very visible, you must walk the walk, and talk the talk.

Ensure you are always available to your guest. This should be your job, although you will always get drawn into the mechanics of running the hotel and it is vital to remember it.

You are not in the business of running a hotel - you are in the business of providing hospitality. These can be two very different things.

If possible be available to greet every guest as they arrive. Be sure to often walk around the property and speak with your guests. Introduce them to staff and vice versa. Everyone loves to be recognised. So using names as much as possible should be encouraged. You should try to memorise every guest’s name. When guests check into rooms, have a warm personal letter or welcome addressed to them by name and signed by the Manager. Have letters for first timers, returnees, multiple repeaters, honeymooners, etc. It only takes a minute, but makes the guest feel special. Send a personal card to guests who haven’t been around for a while.

You are not in the business of running a hotel - you are in the business of providing hospitality. These can be two very different things.

Be sure to walk through every area of your hotel at least twice a day. Never be too busy to greet every member of staff and express personal interest. If you can, spend a few minutes with the room attendant helping to make a bed or with the dishwasher, washing dishes. This will go far towards achieving your vision.

Be sure to listen and follow up when a guest or staff member expresses a concern. It is vital that some action is taken. Don’t be afraid to write off the check of the guest if he didn’t enjoy dinner, or send some fruit to the room of a dissatisfied person.
In many cases, a sympathetic ear is enough; people want to be heard. The dissatisfied guest offers the greatest opportunity for building repeat business, as they create the best opportunity for you to show you care. Don’t waste these moments and don’t count the cost. Take action that goes beyond their expectation. It will pay dividends. This applies also to building a loyal staff.

Obviously, you have some maintenance functions and these may include:

- Review income
- Banking
- Payroll
- Purchasing
- Quality inspection
- Holding staff meetings
- Marketing
- Review reservations
- Answer mail
- Update personnel information
- Local community activity
- Hotel Association meeting

Set aside time in each day to fulfil a portion of these activities.

A regular schedule with a check list may be very pertinent if tailored to your specific needs. When you know that these control functions are in place, you can be free to spend time wandering around the property which can be a full time job in itself.

Who and What is a Guest?

- A Guest is the most important person in the hotel business.
- A Guest is not dependent on us - we are dependent on him/her.
- A Guest is not an interruption of our work - he/she is the reason for it.
- A Guest does us a favour when he/she calls - we are not doing guests a favour serving them.
- A Guest is a part of our business - guests are our business and not outsiders.
- A Guest is not a cold statistic - he/she is a person.
- A Guest is not someone with whom to argue or match wits.
- A Guest is a person who has needs - It is our job to fill those needs.
- A Guest deserves the most courteous and attentive treatment we can give.

(The above list can be reproduced and posted in staff areas as a reminder.)

Every Guest who enters your establishment is a "Very Important Person."

It is the responsibility of all hotel personnel to see that he/she is waited on quickly, quietly and efficiently.
All visitors to your hotel are potential guests; they may be staying at another hotel, or visiting your country on a cruise or on a yacht. One outstandingly successful small hotelier says his hotel received up to ten rooms per month from this source.

A guided tour should be given to all visitors and “outside visitors”. They should not be allowed to wander around.

**PAMPERING YOUR GUEST**

There are many ways to pamper your guest. Here are a few ideas, but you, knowing your guests, will be able to find your own ways to make them feel welcome, appreciated, special and important.

- A bowl of fruit or flowers in the room when the guest arrives will make them feel like a VIP.
- Pre-registering your repeat guests.
- A bottle of wine for a returning guest is a nice touch.
- When your guest has an anniversary, birthday or other special occasion, a cake or a bottle of champagne is always appreciated. (Be sure to make a ceremony of this presentation.)
- When turning down the bed at night, a plate of fruit, candy or some other token will please your guests and send them to bed happy.
- Most hotels provide guests room amenities such as shampoo, hand and body lotion, suntan lotion, shower caps, sewing kits, etc. These items are very well received and are becoming expected.
- Sending birthday, Christmas cards, or discounted local tours information helps to increase your repeat business.
- A guest history should be kept (either on index cards by hand or on computer). For returning guests of five years, ten years etc., have a cocktail party and present the guest with a plaque (or similar gift) of recognition. This demonstrates your appreciation for his continued patronage.
CHAPTER TWO
THE HUMAN RESOURCE
THE HUMAN RESOURCE FUNCTION

Your staff are your most precious resource. The hotel business is people - people serving people - everything else is framework and window dressing. In this chapter we will explore the variety of things necessary in managing this component.

The hotel business is people: People serving people

STAFFING
RECRUITMENT AND SELECTION

The recruitment and selection process is one of the most important in managing human resource. Hiring the right person can be critical to the operation as this business of hospitality requires persons with a positive customer focus outlook. Remember that you always have internal and external candidates. Use the job description as the outline for your job advertisement. Post it in-house before you advertise locally. Taking up a new position can be a great development opportunity for your staff.

If an employee applies who is not qualified, explain why and help them with a training plan that may make them eligible in the future.

THE INTERVIEW PROCESS

If possible, do a telephone interview first to gain a sense of their basic knowledge of the position for which they are applying. Every applicant, including internal candidates, should have a face to face interview. Review your applications carefully (see appendix for a form that can be used).

Once you have a short list, be sure to set up the interview properly. Set aside a clear time and give specific instructions to the interviewee (you’ll find out how well they follow instructions). If there is a supervisor involved allow him/her to sit in on the interview and ask their opinion. Create a non-threatening environment.

Follow these basic steps:

- Begin by putting the interviewee at ease – talk about shared experience
- Confirm information on the application
- Ask them to tell you about their past experience in chronological or reverse order (allow them to talk)
- Ask structured open ended questions which will allow you to find out their methods of handling situations. “Tell me about an occasion when you had to handle an arrival whose room was not ready. What did you do?”
- Look for contradictory evidence. Ask questions which might find a different behaviour pattern.
- Allow interviewee time to answer. Don’t be afraid of silence. Don’t provide the answers. Let them know it’s okay to take time.
- Seek to confirm your impressions
- Ask them if they have any questions
Always take time before making an offer. Don’t make a snap decision. Review your notes and replay the interview in your mind. To help you to get a better sense of the candidate do a background check. Call and talk to references and previous employers to get a better picture of the interviewee.

Discuss the candidate with them and also with the supervisor who attended the interview. Make an offer verbally and in writing.

**PAYROLL**

Once you have hired a new employee, it is important that you immediately get them into their roles. Ensure that the person who handles the accounts is notified that the new employee is added to the payroll.

Remember that it is very important to review with your new employee matters such as salary payment procedures, tipping and any incentives or bonus you may offer or wish to pay.

**UNIFORMS**

Uniforms create an opportunity to add to the ambiance of the property. They can add an attractive touch of colour reflective of our tropical Caribbean environment and promote pride in the organisation. It is often perceived as an employee benefit, particularly when the uniforms are laundered on property.

Be sure you purchase materials that will wear well, and be comfortable. Involve the employees in the selection decision since this will create a sense of pride and commitment.

Be sure the uniform selected is appropriate to your environment. Establish a policy on uniform use. The wearing of a uniform helps to establish team spirit.

Discourage staff from wearing their uniform to and from work. Provide appropriate lockers and change rooms so that you can insist on good personal hygiene and neat appearance.

**ORIENTATION**

The orientation is another important process in that it helps the employee to have a better understanding of the operation as well as connect and bond with the organisation.

Even in the smallest hotel there are several departmental areas. It is vital that a new person is given the big picture of the operation before starting on their particular job.

Set aside time for the new employee’s first day, preferably when they arrive, to meet with you. Once again sit in a non-threatening location and make them feel at ease (remember this is a big day for them). Spend some time reviewing your background and the history of the hotel. Give them a sense of belonging by knowing where you came from. If you have pictures use these.
Have everyone responsible for the success of the new player

Share your vision, mission and goals.

Go over the employee handbook, company policies and all important matters such as pay day, uniform policy etc.

Try to finish in the person’s area and call all the staff together (this is best pre-arranged). Introduce the new member and use it as an opportunity to demonstrate teamwork. Have everyone feel responsible for the success of the new player.

Hand over the employee to their direct supervisor and ask that they bring the person to see you at the end of the shift. Be sure the supervisor has the job description and will go over it first.

At the end of the day, take a few moments to meet with the new employee and don’t assume that they are comfortable. Find out how their day went - make adjustments if necessary.

During the next week try to follow up once or twice. After a month, meet with them again to follow up on how they have settled in.

EMPLOYEE MANUAL
It is important that employees have a guide as to what performance is expected of them. An employee handbook documents the company policies and code of conduct expected of employees. It is an important reference tool for employees. The employee manual adds credibility to your vision of the company. Use it to outline your vision, the company mission, what you offer and what you expect from the employees. Also use the handbook to test employees’ knowledge of the company polices.

Meet with all Staff in a particular job category and ask them to outline what their job includes

With desktop publishing, it can be produced very inexpensively, but should be attractive and treated with respect.

Having the employee sign for it will give it credence.

JOB DESCRIPTIONS
An integral part of training, coaching and holding people accountable is that they are fully aware of their job. Job descriptions play an important role in doing this. Some samples are included throughout this book. You will note that they include the job title, job summary or purpose, a list of the main duties and occasional duties.

Developing Job descriptions need not be a cumbersome process but should be completed for every area. The best method is as follows:

- Meet with all staff in a particular job category and ask them to outline what their job includes.
- Record on a flip chart
- Add items that you feel should be there with their agreement
- Combine duplications
- Prioritize in some logical format
This information, with the appropriate headings, will define the job. This is a good exercise to do at least once a year.

Place a copy in everyone’s file but be sure that the employee and his/her supervisor each have a copy. You may wish to ask the staff to sign for their copy.

When counselling always refer to the relevant line in the job description. Be sure it was part of their job expectation. You cannot fairly hold someone accountable for that which they have never been trained or required to do.

HOLDING PEOPLE ACCOUNTABLE
Although we commonly have numerous policies and procedures, we often fail to properly hold people accountable. Holding people accountable is vital to a successful operation.

To this point we have mentioned - improvement in performance, communicating the vision, and giving people the right tools and motivational environment. We must also make them responsible for the outcome. We cannot assume that they will automatically remember or do as they were told.

We have copious policies and procedures, but we often fail to properly hold people accountable

We can compare the hotel employees to a sporting team. Among the reasons why winning teams win are they are knowledgeable, they practice and have a coach who guides them. They have set standards of performance they seek to achieve. It is no different in the hotel environment.

- We set standards
- We train to the standards
- We coach to the standards
- We counsel to the standards
- We discipline to the standards
- And in some cases we change the standards

The cycle must continue, and all employees must receive enough feedback to be fully aware of how they are doing vis-a-vis an agreed target. If they are doing well, tell them so. If they are not, inform them of what they need to do to improve.

If they do not, keep trying or, when it becomes too big an investment, cut your losses. If they do improve, raise the bar!

The CaribCert system of standards and certification can help to raise the bar. CaribCert is regional certification offered by CHA. It is based on occupational standards for approximately 45 positions in four main areas: Front Office Operations, Housekeeping, Food Service and Food & Beverage Preparation. Employee’s mastery of the standards can lead to them being certified in their occupation. Certified employees tend to be more motivated, productive and professional as they take pride in their professional development. Contact CHA to register employees.
PERFORMANCE EVALUATION

If your staff are truly going to achieve your expectations and meet your guest needs they need regular feedback on their performance. It is recommended that you set time aside with them and go over their job description and their performance on a regular basis.

When doing an evaluation, fill out the form in advance and ask the person being evaluated to do the same. Set a time when neither of you are rushed. Pick a non-confrontational environment. Do not sit behind your desk.

The appraisal should be balanced. Ensure that you emphasise all the positives as well as reviewing the negatives. It is often appropriate to go through the review first and highlight above average scores. Then return and focus on each area of concern. Allow for dialogue and truly investigate why the performance is not meeting the standard.

Set goals for improvement. Identify specific areas for improvement.

Always finish on a high note. Be direct in addressing concerns and frank in the expectations and consequences. Performance will only improve with the employee’s recognition of his/her weak areas.

The tone of the discussion should be sincere. Avoid employee bashing. The emphasis should be on improving performance, adhering to the standards not personal demands.

STAFF MEETINGS

Make them short and regular
It is better to hold short meetings weekly than long ones sporadically. If you meet at predetermined times then the meetings will be expected and looked forward to. If your schedule is such that all employees cannot get together at one time, schedule departmental meetings. Hold meetings on company time: they are for company business. Break up while everyone is still enthusiastic. Don’t wait until the meeting drags and the staff gets restless.

Plan ahead
A few minutes of preparation pay big dividends. If you go to the meeting with an agenda or definite objectives, you will be in control. Skill in conducting a meeting comes with practice. Allow employees to be heard; this will generate interest and raise morale, but don’t wander from the subject.

Begin and end on high notes
You can always find things to praise. Take time to point them out. Comment on them!

Keep them friendly and personal
Let everyone know it’s a “family” gathering. This is where team spirit comes in. Work in a few points of personal interest. Maybe someone has had an addition to his/her family or is getting engaged or won at bingo last week. Keep it friendly. Listen to grievances, but omit names. The time to mention names is when you’re praising, not criticising!

Stick to the subject
Short, enthusiastic meetings are possible only if the group is “held” to the subject under discussion. This is when you must be firm.
Explain that questions that are not pertinent must be shelved until another time, unless it concerns something vital that must be dealt with at once. Your ability as a leader will show up here.

You may occasionally have a question & answer meeting. Keep the discussion on the subject of the moment. Allocate a specific amount of time per question, then move on to the next question.

**Get the staff involved**

There is always a danger that you will get so good at conducting meetings that you can't bear to quit talking. Remember that the meetings are for employees. Avoid having managers or talkative employees monopolising the meetings. Draw out the quiet and hesitant ones. Let employees know they may speak their minds without fear of reprimand. Try to understand the individual’s point of view. If the employee is wrong, attempt to guide his/her thinking in the right direction. Guide! Don’t force it down their throats.

**Talk privately with those who disagreed**

They may not have understood, or they may be right!

Find time to offer a personal explanation. If there is too great a time lag, employee interest wanes and they may feel that you talk one way, but act another. Make sure employees and management follow through.

**Keep topics varied and interesting**

There are dozens of subjects appropriate for discussion: guest comments, company policies, job standards, promotions, or merchandising methods. Encourage employees to suggest subjects verbally or in writing.

There are many visual aids such as videos, slides, etc. that provide a change of pace. Check with the CHA/CHTI office for recommendations. You might have someone from the local tourist bureau speak on local points of interest.

**DISCIPLINE**

Occasionally it is necessary to discipline an employee on poor performance.

Give a verbal warning first. This will often solve the problem by bringing the seriousness of the situation to the attention of the employee. A verbal warning and coaching and counselling may put the employee back on the right path.

However, if the employee continues with the infraction then stronger action may be needed. A written warning should follow the verbal warning. Some organisations offer a second written warning in follow up to the first. In the event the situation continues then suspension and/or termination may be warranted. Some examples of a written warning are attached in the appendix.

**Late/absent report**

One of the most important parts of job performance is timeliness. A Late/Absent report should be filled out for anyone who does not report to work or is over 15 minutes late.

**Communication notice**

When performance does not meet expectations, it is vital that we coach the
employee in the standards that are not being met.

Occasionally it will be necessary to commit the counselling sessions to writing. If it is required that you coach someone repeatedly on the same infraction, it will become necessary to document the situation.

This should be done with the employee and their supervisor present. A full discussion from all concerned must be encouraged. In the case of a second warning, the owner/manager must be involved.

When giving a warning, be frank and forthright but not aggressive or confrontational; ensure all parties sign as necessary.

It is very appropriate to also give a written commendation where someone has done something truly outstanding.

Documenting these situations using short “notes on file” will form part of the employee's file.

The termination
Despite all of your best efforts, people will leave or you will have to let them go. (See the appendix for possible documentation.)

In cases of a voluntary resignation, it is normal that a regular employee give a minimum of two weeks notice and management give four weeks notice. An employee wishing to resign should do so in writing to his/her department head.

Anyone being separated for cause should be terminated on the spot. Accrued vacation is normally paid.
CHAPTER THREE

THE FRONT OFFICE
The importance of the front office cannot be over-emphasised. This department represents the single largest profit centre for hotel-room sales. The Front Office is normally referred to as the "Hub" of the hotel, as all the hotel activities centre on the look of the Front Office Staff.

The Front Office works closely with the other departments of the hotel in ensuring quality guest service.

Check-in and check-out activities often influence the first and last impressions of the property, its staff, and its philosophy.

**First impressions are lasting**

First impressions are lasting. If guest begins a visit in a pleasant frame of mind as a result of front office courtesy and service, the chances are excellent that he/she will view other services favourably. An unpleasant experience however can harm the property’s reputation and ruin the guests’ stay. Front office staff must be trained to care about the guest. Front office employees are important to the hotel as they play a very important role in ensuring quality guest service and guest satisfaction.

**BASIC FUNCTIONS**

There are three basic functions of the front office. They are:

1. To sell rooms, which includes registering guests and assigning rooms.
2. To provide services, such as handling mail, faxes, and messages for guests and furnishing information about the hotel, the community and special attractions or events.
3. To keep accounts, determine credit, render bills, receive payments and provide for proper financial and credit accommodations.

**RESERVATIONS PROCEDURES**

One of the most critical operations at any property is the reservation process. This function controls the flow of guests into and out of a property, enabling travellers to make plans in advance and to be assured of a room upon arrival and enabling the Hotel to maximize revenue.

"Last night's empty room can never be sold again!

**PROCESSING RESERVATIONS**

Every property has its own method of processing reservations. Some are computerised, others are still manual. But while the mechanics of taking the reservation, filing it, placing it in the rack, assigning rooms, and completing the folio may differ from property to property, the objective is still the same. To accommodate guests in such a way as to obtain maximum occupancy with the greatest guest satisfaction.

At the start of each day, a print out of arrivals with room assignments, special requests, VIP’s, should be made. The
occupancy reports should be collected by the housekeeping department from the front desk. These reports must be reviewed by the Housekeeper and work assignments distributed.

**READY ROOMS**
Ready rooms must be communicated to the front desk as often as possible, especially at very busy periods. With this information in hand a room can quickly be assigned for an early arrival or a walk-in guest.

**CHECK OUT ROOMS**
The front desk should advise housekeeping when a guest has checked out of a room and of an early check-out so that the room can be prepared for “ready” status as soon as possible. As soon as housekeeping receives word of a check out, the appropriate room attendant will be notified to add that room to her/his list. Once the room is cleaned and in order, the flow of information is reversed so that front office will know the accurate room status.

**SPECIAL REQUESTS**
Special requests such as bed boards, cots and baby-sitters need to be passed on to the housekeeping department prior to arrival so that proper arrangements can be made. In the case of VIP rooms, flower arrangements or turn down service may be required. It is important that these requests are passed on with precision from the front office to the housekeeping department.

**OCCUPANCY REPORT**
The occupancy report is a very important tool for all departments because it informs them of how many people are occupying each room so that adequate linen and supplies can be placed in the room.

This report can be made available to the Housekeeping Department twice a day or at the beginning of each shift.

**MAKING RESERVATIONS**
Ensure your reservations staff are knowledgeable and current with every aspect of the Hotel. Good communication skills are an asset.

The following list explains the basic steps involved in taking and processing a reservation.

1. Obtain and record the following information from the guest:
   - Name of guests
   - Number of people in party
   - Complete address
   - Phone/fax number, including area code
   - Email address if available - business and personal
   - Business affiliation, address & phone number (if applicable)
   - Number and type of rooms & type of beds
   - Dates of arrival and departure
   - Type of reservation required (time of arrival, guaranteed advance deposit, special request for meals etc.) and rate, if applicable
   - Method of payment
   - Name of person making reservation
   - Source of Information
Therefore, as when performing any guest service, be as polite, courteous and efficient as possible.

There are three basic steps to cancelling a reservation:

- Be sure to obtain all the information provided on the reservation file to ensure that the proper reservation is cancelled.
- Some properties find it helpful to issue cancellation numbers and maintain a log of these numbers.
- Tell the guest you are sorry he/she will not be able to stay at your property and express the hope that you can be of service on a future trip.

For guaranteed reservations, refund should be made according to hotel policy.

COMPUTERS AND THE FRONT OFFICE

Computers are a very important tool in any size hotel. A computer-based property management system carries out a number of front office and back office functions.

All hotel property management systems do not operate identically. However, there are four common front office software modules:

- Reservations
- Rooms management
- Guest accounting
- General management

RESERVATIONS

This software allows a hotel to rapidly
process room requests and generate timely and accurate rooms, revenue and forecasting reports. This system enables reservationists to respond quickly and accurately to callers requesting accommodation. A computerised reservation system significantly reduces paperwork, physical filing, and other clerical procedures. This provides reservationists with more time for callers and for marketing the various services offered by the hotel. Previously stored information can quickly and easily be accessed for updating and confirmation purposes.

Reservation records are stored in an electronic file and are commonly segmented by arrival date, group name, or guest name.

ROOMS MANAGEMENT
The rooms management package is an important information and communication tool within the front office department. It is primarily designed to strengthen the communication links between the front office and the housekeeping department.

This package shows the front desk the current status of each room just as a room rack does in a non-computerised operation. Once a room is cleaned and ready for occupancy, this information must be passed on to the front desk where it can be entered into the system.

It is also capable of room and rate assignment at the time of check in. In addition, the ability to display guest data on terminals at the front desk, switch board, concierge, and any designated station eliminates the need for traditional front office tools such as room and information racks and charts.

GUEST ACCOUNTING
The guest accounting module is the most critical component of the property management system. This system creates electronic folios which enables charges to be posted to the guest’s account from any of the point of sales terminals. The front office section is primarily responsible for the on-line charge posting, automatic file updating and folio display/printing.

GENERAL MANAGEMENT
The general management module accesses data from the other front office modules and serves as a report generator. Information can be collected from select files to suit specific information needs of management. For example, the module could be used to maintain detailed guest history files. This module may also be responsible for combining and summarising diverse transactions into comprehensive reports. A general management module cannot operate independently of other front office modules.

CHECKING-IN THE GUEST
PRE-REGISTRATION
Registration cards may be hand written or computer printed during the slow hours of the morning shift. The receptionist should double check all registration cards to ensure
that each one has a room assignment. If appropriate, keys should be taken out and attached to the registration card to ensure that keys are available for each arrival room.

A designer packet which contains all these items can be useful and a positive marketing tool.

**THE RECEPTION PROCESS**

As soon as the guest presents himself at the desk a series of procedures referred to as the registration process begins. The guest must be greeted immediately upon arrival at the front desk. If you are engaged at that time, some indication must be made to the guest that you will be with them momentarily. Never keep a guest waiting unnecessarily.

**CUSTOMER RELATIONS**

Conversation encourages a more relaxed atmosphere between you and the guest. It makes the guest feel that you genuinely care about him/her and that his/her presence is appreciated.

Introduce yourself if you haven’t done so before and politely ask the guests’ name. It is always important to address guests by name. First names makes the guests’ experience more personal but only if this is appropriate to the guests’ culture.

Be as specific as possible in your enquiries, use guest history to help if you can obtain one.

Now that you’ve made each others acquaintance, strike up a conversation. For example,

- “How was your flight?”
- “Is this your first time to ...?” (Research the Guest History)
- “Is there anything in particular you’d like to see or try while you’re here?” (The guest’s baggage can often offer a clue with items such as golf clubs, tennis rackets etc.)
- “May I make a few recommendations?”

Always make helpful suggestions and recommendations of things to see and places to visit. Have the guest fill out the registration card; have pens available and ask the guest to complete the registration card. You must verify the information.

**REGISTRATION**

Upon completion of the registration card, review it carefully to ensure that the name corresponds to the previously printed name, the departure date is correct, the guests’ signature is at the bottom of the card, and the method of payment is indicated.

Always get a credit card imprint even when the guest expresses that he/she will be settling by cash. Explain politely that this is a standard hotel policy and the imprint will be returned to the guest upon check out. If the guest does not have a credit card then be sure to collect a cash deposit which will cover the room rate plus tax for the number of nights the guest is expected to stay.

In a small hotel whenever possible a senior member of management should escort the guest to their room. This will be a major plus
in personalising your service. Use this time to sell services. As sometimes it is a good idea to always telephone the room a few minutes later to ensure that everything is comfortable.

**In a small hotel whenever possible a senior member of management should escort the guest to their room. This will be a major plus in personalising your service.**

Have a system in place to recognise birthdays, anniversaries, etc. Use discretion when conversing with guest.

**GUEST CHECKING-OUT**

Prior to check-out time, on the day of departure, the guest folios should be pulled and reviewed to ensure that all charges have been posted and nothing has been double posted. Send to the room the night before departure with a thank you letter. Encourage the guests to settle their bills early to avoid delays.

Upon the request of the guest, the individual folio should be pulled and handed to the guest. If there is a discrepancy, it should be handled in a very courteous and professional manner.

If a problem starts to develop, try to move the guest to another less public area away from the Front Desk. Never show disgust or frustration and always be patient. Pull the individual charge slips, if necessary to solve the discrepancy and advise your immediate supervisor if any adjustments have to be made to the bill and seek approval before doing so. Review your policies here carefully with staff and give them as much discretion as possible.

The next step is settlement of the bill. If the guest is in agreement with the total bill, have him/her sign at the bottom of the folio and settle the charges either by cash or by credit card. If a credit card is being used, obtain a new authorisation number to include the additional charges. If cash is being used, remember to return the unused credit card voucher to the guest for him/her to destroy. Request the guest to complete a guest comment card before departure. Encourage him/her to include both positive and negative experiences and people’s names.

Thank the guest for choosing “(your hotel name)” and invite him/her to come again and bring a few friends.

**TELEPHONE TECHNIQUES**

Your telephone connects you with the world! Within seconds, you can speak with people thousands of miles away. Using your phone effectively means communicating clearly and communication is essential in today’s business world. At work, people rely on the telephone to:

- Provide information
- Answer questions
- Sell products
- Place and receive orders
- Solve problems

You must create a positive image for your company each time you use the phone.
CHAPTER THREE

Remember, you are a company representative in every conversation. People remember the impressions they get from a phone call - even if the call doesn’t seem important to you at the time. Do your part to make a good impression by being friendly, courteous, helpful and businesslike. Your hotel should have written policies on the way you wish your phones to be answered.

**PREPARE YOURSELF**

Learn the features of your phone system through company training, service manuals and instructions. Ask questions about anything you don’t understand. Review procedures periodically, you may find new ways to make your job easier.

Practice using your phone system until you can handle calls smoothly and confidently. Losing a call or cutting someone off leaves a very bad impression.

Position your phone so that your writing hand is free, on the left side for right-handers, on the right side for left-handers. Be sure cords don’t interfere with walking or, desk space.

**ANSWERING THE PHONE**

Communication is a two way street. Here are some tips to make your “way” a little easier.

Answer Promptly - within 3 rings if possible.

Concentrate on answering the phone. Avoid talking with others, eating, or anything else that takes away from your concentration.

Keep paper and pencil handy to make notes and take messages. If you write down something, you won’t forget it.

For more information refer to your Caribcert Standards.

**ANSWERING YOUR OWN PHONE**

Answer calls yourself, if possible, instead of having calls screened. It saves the caller time and builds good relations.

- Identify your department and yourself immediately. For example: “Customer Service, Celia Roberts speaking”
- Be friendly so that every call gets started on the right foot.

**ANSWERING SOMEONE ELSE’S PHONE**

- Offer to help the caller in any way you can.
- Don’t make the caller feel that the call is a bother, not important or that it may not be returned promptly.
- If you must put a call on hold, get permission from the caller. Some people would prefer to call back later.

**TAKE ACCURATE MESSAGES**

- Date and time
- Name of caller
Courtesy is important for every phone call, no matter what the subject or problem. Show respect and use courteous language.

Personality can make any phone call more pleasant. Concentrate on being cheerful and interested. Try using a tape recorder to listen to your own voice. Do you sound like a person you’d like to talk to on the phone?

Clear speech helps get your message across. Practice with a tape recorder to be sure that you can be easily understood. Don’t hold the receiver too close to or too far from your lips, about two inches is usually best.

Appropriate language is necessary for good business relationships. Avoid slang and local expressions. Use technical terms only if the caller is familiar with them or if absolutely necessary. Define and explain any special terms.

Careful listening is the key to understanding and relaying information. Concentrate on what’s being said and avoid interrupting. Restate what is said, in your own words, to be sure there’s no misunderstanding.

GUEST COMMENT CARDS
The guest comment card is one way of receiving feedback on a guest’s visit to your property. The questions on this questionnaire should be concise and clear, avoiding too many questions that will provide a yes/no answer. Try for a mix of check-off and written answers.

Don’t give the guest a choice of three or five alternatives to select from, the one in the middle is always an easy way out. Try not to exceed ten questions as you may lose the attention span of the guest.

Make allowance at the end for “additional comments” so that a particular situation may be explained if so desired, or a few points may be listed.

Ensure that the name and address of the guest is recorded.

Management should always review these comment cards; a lot of useful comments and suggestions come from the guests. If a particular member of staff is made mention of, he/she should be commended and encouraged to continue performing well, and a copy of the card should be placed on the staff notice board and used as a motivator for other employees.

Develop incentive programs to both collect cards and recognise those of your staff that perform well. Develop a year round “most improved employee award” on a month to month basis. An accumulation of these
awards from one department will determine the most improved department.

**GUEST INFORMATION SHEETS**

The guest information sheets are helpful bits of information compiled by the hotel and placed in each guest room, they list services offered in-house and general hotel information. Below are items that may be included on a guest information sheet:

- Hotel Gift Shop, Phone Number
- Hours of Business
- Check-out time
- Pool Hours/Pool Towels
- Special services (laundry and baby-sitting, business centres, Internet access)
- Hotel Entertainment Gym/ Fitness Centre
- In-house Extensions
- Local Excursions
- Local Restaurants
- TV Channels listings

It is additionally helpful to the guest to have specific information by the phone on Phone Charges and Dialing Information.

A daily or weekly activity sheet will help promote special activities. You can also incorporate current news items.

**SECURITY WITHIN THE FRONT DESK**

The front office plays a particularly important role in the overall security program. Where a security department exists, there should be close communication between the two departments. Front desk staff should be alert to the following:

- undesirable guests
- left or unattended luggage
- other security measures discussed below.

The failure to collect payment for the products and services received by guests is usually a more significant loss than the theft of towels.

Management should establish procedures which ensure that all of the charges made on premises are promptly reported to the front office for proper guest billing.

There should be no time lag in updating the folio which could allow the guest to check out without paying for all products and services received.

**PREVENTION OF FRAUD AND THEFT**

The front office must follow established procedures by management and accounting with respect to handling cash, checks, and credit requests, to help the property from incurring losses through bad debts.

Credit card fraud has become ‘big business’ today. This may involve the use of stolen, counterfeit, and altered cards. Special care should be exercised by all employees who may be presented with credit cards.

1. Check the signature block to ensure that the card is signed and the expiration date to ensure that the card is valid. If the date is expired, it should be pointed out to the guest tactfully so another method of payment can be arranged.
2. In the event that you accept a check, it should never be a second party check (made out to the person paying the bill and endorsed to the hotel), nor should it be post dated. Request at least two pieces of identification which should be documented.

3. Always verify the credit card with the credit card company, without inconveniencing the guest.

4. If accepting travellers checks, ensure that there is already one signature on the check and that the second signature (signed in your presence) corresponds with the first.

*See section on American Express

KEY CONTROL
A system of key control is essential to the security of a lodging property. All keys should be adequately controlled. The best lock in the world may be unable to protect a property or its guests if poor key control allows a criminal to obtain a key to that lock.

Most properties use at least three levels of keying:
- Emergency keys
- Master keys
- Guest room keys

The emergency key opens all guest room doors, even when they are double locked. It can be used, for example, to enter a room when the guest needs help and is unable to reach or open the door. This key should be highly protected and its use strictly controlled and recorded. One procedure for emergency keys is to have them locked in a safe or safety deposit box and signed out by the individual needing it. Two signatures are recommended.

The master key opens all guest rooms that are not double locked. When not in use, it should be secured in a designated place for safe-keeping. It should be issued to authorised personnel based on need, not on their status. A written log should be maintained, including name date and time of issue and return.

The guest room key opens a single guest room if the door is not double locked. Guest room keys should be controlled by front desk personnel, who should always make sure that the person requesting the key is the guest registered for that room. Appropriate identification should always be requested.

EMERGENCIES
In the event of an emergency, the front office becomes the command centre of the hotel. All communications is based at this point. The guest will rely on information concerning the situation and directions from the front office staff. All staff should be knowledgeable of emergency procedures in the case of black-outs, fires, hurricanes, earthquakes, etc. The degree of emergency preparation that is feasible will vary from property to property.

Be familiar with your country’s emergency procedures.
Small Hotels are advised to develop their own internal “Disaster Procedure Manual”, and ensure all employees are familiar with these procedures.

**BE PREPARED FOR EMERGENCY TELEPHONE CALLS**

Your life, and the lives of others could depend on it.

1. Dial 911, 999, or the appropriate emergency number.
2. Give your name.
3. Give the address of the property.
4. State the problem clearly and accurately.
5. Stay on the line for instructions until you’re told to hang up.

* Keep emergency numbers posted near your phone.
CHAPTER FOUR

HOUSEKEEPING
HOUSEKEEPING - NOT JUST ‘KEEPING HOUSE’

Owners and managers of profitable hotels understand the importance of a professional and well run housekeeping department.

Cleanliness is of prime importance when a guest chooses a property for the first time and that affects whether he will return. Professional housekeeping staff have a great influence on the maintenance costs of a hotel. Items that are clean, require a lot less maintenance and look good for a lot longer.

When it comes to customer care, no other staff members can have greater input into making the guest comfortable, than the housekeeping staff. It is their duty to turn the hotel into a home away from home.

Many owner/managers have started to look at their housekeeping operations in a new light. No longer are head housekeepers considered glorified room attendants, though in smaller properties some of their duties may still include servicing guest rooms, but as knowledgeable professionals who have a significant role to play in the success of the property.

A housekeeper requires a thorough knowledge of:-

- Cleaning agents (chemicals)
- Scheduling staff
- Scheduling special cleaning
- Dealing with all levels of people
- Property Maintenance

With many smaller properties reducing food and beverage services or franchising them out, some owner/managers are taking responsibility for their housekeeping department. It is a challenging department and not one to be underestimated!

It is a challenging department and not one to be underestimated!

THE LINEN ROOM

The headquarters of the housekeeping department is the linen room. (In the case of small hotels the linen and laundry room may be combined.)

It is absolutely essential to have the linen room very structured and organised.

Labels should be placed on all cleaning agents to ensure that the user is aware of the substance he/she is using and of any precautions that substance may require.

Safety Training is essential, as is an awareness of local legal requirements.

Issuing and Returning Linen

Linen should not be accessible by anyone except the issuing clerk to prevent loss and theft. After receiving work assignments, room attendants should go to the issuing clerk with the number of rooms he/she has been assigned to clean. The amount of
linen etc. taken out should be recorded in a log book with the following details:

- Name of room attendant
- Date and time
- Rooms assigned
- Number and list of supplies received

In the same way, soiled linen should be returned to the linen room and logged in. Use a debit/credit method.

Any damaged or torn linen should be recorded in a different log and separated for inspection by a supervisor.

A decision will then be made by the supervisor as to whether to repair or dispose of the linen.

All linen should be examined on a daily basis.

**Storage**

Clean linen should be stored on shelves which allow for ample air and light to prevent musty odours and insect inhabitation. Soiled linen should be stored in baskets and containers with lids, to reduce odour. Wet towels should be laundered as soon as possible for the same reason. Never store soiled or damp linen in plastic bags.

Do not wait to wash. Staining and mould are the greatest destroyers of linen.

**SAFETY**

Safety is another very important issue within the housekeeping department which cannot be taken for granted or ignored. Room attendants are constantly in contact with harmful cleaning agents and machinery which could be harmful if not carefully operated.

Education needs to be given on communicable diseases.

**Labels**

Labels with the name of the substance and precautions must never be removed from the container. In the event that a label comes off, one should be made and replaced on the bottle immediately. Lack of labels can cause misuse of substances and create potential danger to both staff and guests.

Commercial suppliers are a good source of information and staff training.

**Steps and Ladders**

After steps or ladders are used, they should be returned to their proper storage position, out of the way of anyone to prevent accidents. Always make sure that they are fully open and sturdy before stepping on them. Do not climb on other items. Always use a ladder!
**Spills/Wet Floors**
Always clean up spills of any liquid or powder on the floor, to prevent anyone from falling. Place a caution sign to alert passersby.

**Manuals/Instructions**
Be sure to read operating instructions and manuals of all equipment, before use.

It is the responsibility of the supervisor of the department to ensure that all staff involved are trained on the operating procedures of the equipment they have to use.

Always encourage staff to ask questions if they are uncertain about something.

**Irons and Appliances**
Irons, and any such appliances should be unplugged and placed in an upright position after use, as they can be fire hazards.

The iron should be removed, and the ironing board folded and placed out of the way, to prevent the possibility of burns.

**Security - Locks and Keys**
Storeroom locks can be critical to the housekeeping department.

Locks and keys can be used as a method of control by the housekeeping department.

Have one set of master keys, accessible to the housekeeper or his/her assistant only.

The room attendants should only have the master key to the rooms for which they are responsible.

The use of these keys should be recorded, including time out, time in, and by whom.

**MAINTENANCE**
In some small hotels maintenance is the responsibility of the person in charge of housekeeping or the owner/manager.

In the case of many properties, there is at least one, sometimes two maintenance staff. The maintenance staff, however small it may be, must have the management skills and technical knowledge necessary to meet the demands of this department.

Even when separate, the housekeeping department and the maintenance department need to work very closely together for the property to achieve maximum efficiency from both departments. Communication is a critical tool.
**Maintenance Requests**
Room attendants should promptly hand in a written maintenance request to the housekeeping supervisor and to the front desk for each room where he/she finds a discrepancy. A copy of this request should remain in the housekeeping department and be used for follow up. Maintenance requests, master maintenance schedules, and even word of mouth instructions can accomplish the maintenance effort directives, but re-inspection of signed and dated maintenance requests and schedules are required to verify that needed work has been accomplished. It is important that all maintenance requests are prioritized before jobs are started so that the most critical requests are dealt with first.

**Preventative Maintenance**
Every property should have a preventative maintenance program of their own. It is a program designed to keep equipment functioning properly and efficiently, or ready to function upon demand. All manufactured equipment comes with an expected useful working lifetime, and many include a limited warranty. It is common practice to install the equipment, turn it on, and then literally forget about it. This is not a good practice!

All equipment, furniture and fixtures should be inspected by both housekeeping and maintenance on a regularly scheduled basis. Preventative maintenance can help to lower overall maintenance or repair bills. Setting up check lists with “Trace Dates” is a useful way to ensure the appropriate preventative maintenance takes place.

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**Preventative maintenance can help to lower overall maintenance or repair bills.**

**ROOM INSPECTION**
It is very important that every room is as clean as the one before.

Based on a policy of quality standards, there must be some form of measurement to ensure that the rooms are prepared identically for guest arrival. For this reason a room checklist is devised.

The room attendant should be given a check list for each room and the items should be marked off down the list as each task is completed and double checked.

This list should be handed back to the supervisor with the room number and the room attendant’s name included. Listed below are some suggested items that should be included on the room checklist.

Use this in conjunction with an incentive program for excellent work. Have others spot check rooms.

**PORCH CHECK LIST**
1. Clean and inspect porch
2. Porch furniture in good state of repair and clean
3. Outside porch lights clean and working
4. Sweep and mop floor
# BEDROOM CHECK LIST

<table>
<thead>
<tr>
<th></th>
<th>OK</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lights, bulbs, and shades</td>
<td></td>
<td></td>
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<tr>
<td>2. Wiring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Draperies, hooks, rods, etc.</td>
<td></td>
<td></td>
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<tr>
<td>4. Beds, turn mattress and check underside</td>
<td></td>
<td></td>
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<tr>
<td>5. Carpets, rugs or floorings</td>
<td></td>
<td></td>
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<tr>
<td>6. Closets, hangers, lights, laundry bags</td>
<td></td>
<td></td>
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<td>7. Windows - clean &amp; winders working</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Screens - clean &amp; in good repair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Ashtrays and matches</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Information sheets/booklets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Check all drawers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Candles</td>
<td></td>
<td></td>
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<tr>
<td>13. Comment sheet/Stationery</td>
<td></td>
<td></td>
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<tr>
<td>14. Ice bucket or water pitcher</td>
<td></td>
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<tr>
<td>15. Clean glasses</td>
<td></td>
<td></td>
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<tr>
<td>16. Air-conditioning operative/clean filter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Room rate posted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Fire and emergencies procedures posted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Ceiling for dust and cobwebs</td>
<td></td>
<td></td>
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<tr>
<td>20. Island information book</td>
<td></td>
<td></td>
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<tr>
<td>21. Pictures</td>
<td></td>
<td></td>
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<tr>
<td>22. Walls</td>
<td></td>
<td></td>
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<tr>
<td>23. Under beds - clean and clear</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Mini bar stocked (if applicable)</td>
<td></td>
<td></td>
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<tr>
<td>25. Door Lock</td>
<td></td>
<td></td>
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<tr>
<td>26. Telephone</td>
<td></td>
<td></td>
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<tr>
<td>27. Television/radio</td>
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<td></td>
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<tr>
<td>28. Iron &amp; Ironing Board</td>
<td></td>
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<tr>
<td>29. Coffee Pot/ Coffee/ Tea/ Sugar/Cream/Cup &amp; Saucer/Spoon</td>
<td></td>
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<tr>
<td>30. Mirrors</td>
<td></td>
<td></td>
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<tr>
<td>31. Smoke detector</td>
<td></td>
<td></td>
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<tr>
<td>32. Waste Paper basket</td>
<td></td>
<td></td>
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<tr>
<td>33. &quot;Do Not Disturb&quot; Sign</td>
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<td></td>
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</tbody>
</table>
**BATHROOM CHECK LIST**

All items listed below must be cleaned, then checked. If any are missing or damaged, report to the housekeeper for replacement or repair.

<table>
<thead>
<tr>
<th>OK</th>
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</table>

Two of the most important rooms in the hotel are your Ladies’ and Gentlemen’s washrooms.

It is the one place every visitor to your hotel is likely to visit. The visitor will judge your hotel by the way these rooms are kept. Don’t drive guests from your hotel because of dirty wash rooms.

Management must impress upon the housekeeper the need, not only to keep these rooms immaculate, but to see that everything is in good shape.

Repairs must be carried out immediately. Supplies, soap, towels, facial and toilet tissues etc., should always be available.

These rooms should be checked every half hour during the day and every hour during the night; more often depending on business levels.

All items listed below must be cleaned and/or checked.

If any items are missing or damaged, report to the housekeeper for replacement or repairs.
<table>
<thead>
<tr>
<th></th>
<th>OK</th>
<th>NO</th>
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<tbody>
<tr>
<td>1. Hot and cold water</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>2. Basins for cleanliness</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>3. Toilet bowls cleaned inside and out</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>4. Toilets seats for cleanliness</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>5. Urinals for cleanliness</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>6. Drainage</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>7. All taps</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>8. Flooring</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>9. Windows and screens</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>10. Soap dispensers, towel racks</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>11. Handtowels</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>12. Toilet tissues and rack</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>13. Facial tissues</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>14. Doors and ceilings</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>15. Lights</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>16. Flush all toilets, ensure operational</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>
JOB DESCRIPTION

Position - HEAD HOUSEKEEPER
Reports to the General Manager / Assistant Manager

Main Purpose
To ensure the smooth and efficient running of the housekeeping department and to maintain the highest standard of cleanliness within the hotel.

Main Duties
1. To ensure that staff report to work as scheduled, correctly uniformed and wearing their name badge.
2. To ensure that staff comply with the rules and regulations detailed in the Employee’s Handbook, reporting any violations that may occur.
3. To prepare daily work assignments for staff.
4. To make up staff rosters/schedules adjusting them to meet daily requirements, including coverage for illness and sudden changes in work load.
5. To prepare and review time cards.
6. To ensure that all linen rooms, broom rooms and main housekeeping rooms are properly stocked and clean at all times.
7. To requisition proper stock levels from the storerooms.
8. To inspect rooms ensuring that the highest housekeeping standards are maintained at all times.
9. To ensure that all staff under you supervision, are properly trained in housekeeping procedures and are correctly carrying out their specific duties.
10. To measure each employee’s standard of performance against the standards outlined in the company’s policies and procedures.
11. To report immediately any maintenance problems in your work areas by way of a maintenance requisition form to the maintenance department and to re-check that work has been completed, reporting any delays to the manager.
12. To check daily all public areas and assign work as necessary to maintain the highest standards of these areas at all times.
13. To ensure efficient collection and return of guest laundry.
14. To report and log lost and found items.
15. To assist with the efficient close down and reopening of the hotel as necessary.
16. To discuss the shortcomings of subordinates in relation to work habits, and attitudes and to correct deficiencies in job performance and dress code.
17. To attend any training courses that management may deem necessary.
18. To maintain harmonious relationships between management and staff at all times.
19. To provide courteous, efficient and friendly service to our guests and to ensure that all staff are doing similarly.
20. To make recommendations to improve the standards and efficiency of the housekeeping department and hotel in general to the manager.
21. To have regular staff meetings among your staff in order to maintain high communication.
22. To attend department meetings among your staff in order to maintain high communication.
23. To treat all staff with respect and in a fair manner at all times.
24. To carry out additional duties as assigned by the manager, within the department, and any reasonable request of management.
Position - SUPERVISOR
Reports to the Housekeeper

Main Purpose
To assist the housekeeper in ensuring that the department is operated in a smooth and efficient manner and to maintain the highest standard of cleanliness within the hotel.

Main Duties
1. To ensure that staff report to work as scheduled, correctly uniformed and wearing their name badge.
2. To ensure that staff comply with the rules and regulations detailed in the Employee’s Handbook, reporting any violations that may occur.
3. To be responsible for hotel linen, and to check its movements.
4. To assist room attendants in their work when necessary.
5. To provide front office with a list of rooms ready for assignment to guests.
6. To supervise the cleaning of bedrooms, bathrooms and public areas and corridors.
7. To be responsible for arranging flowers.
8. To train staff on a regular basis or as necessary.
9. To replace the housekeeper in the case of absence.
10. To carry out daily room inspections and spot checks.
11. To report immediately any maintenance problems by way of requisition.
12. To attend any training courses that management may deem fit.
13. To maintain harmonious relationships between management and staff at all times.
14. To provide courteous, effective and friendly service to our guests and ensure that all staff are doing similarly.
15. To treat all staff with respect and in a fair manner at all times.
16. To carry out added duties as assigned by the housekeeper, within the department and any reasonable request of management.
Position - ROOM ATTENDANT
Reports to the Housekeeping Supervisor

Main Purpose
To clean and service hotel rooms and public areas to the standard of quality laid down by hotel policy.

Main Duties
1. To report for duty according to roster promptly each day wearing the correct uniform and name badge.
2. To maintain the highest standard of cleanliness, hygiene and personal appearance at all times.
3. To service all occupied, departed and vacant rooms as required.
4. To ensure that carts, trollies and service areas are kept clean and tidy at all times.
5. To ensure the correct use of storage and linen at all times.
6. To ensure that all cleaning materials and equipment are used as specified in the manufacture’s directions.
7. To report any maintenance defects to the housekeeping supervisor.
8. To hand in all lost property to your immediate supervisor.
9. To collect and deliver guest laundry to the rooms.
10. To report any complaints to the housekeeping supervisor.
11. To clean staff quarters from time to time.
12. To be familiar with, and abide by, the rules and regulations detailed in the employee’s handbook.
13. Attend any training courses that the hotel management may deem fit.
14. To foster good relations with all hotel staff and management.
15. To attend departmental meetings when scheduled.
16. To carry out any other reasonable request of management.
Position - HOUSEMAN
Reports to the Housekeeping Supervisor

Main Purpose
To clean and service hotel bedrooms, public areas and service corridors to the standard of quality laid down by hotel policy.

Main Duties
1. To report for duty promptly each day according to roster wearing the correct uniform and name badge.
2. To maintain the highest standard of cleanliness, hygiene and personal appearance at all times.
3. To clean hallway carpets and maintain the general cleanliness of public areas and service corridors.
4. To carry out major cleaning jobs within guest rooms such as cleaning with heavy duty vacuum cleaners and shampooers, cleaning walls, moving furniture, cleaning windows and hard to reach spots upon request of your supervisor.
5. To ensure the correct use of all cleaning materials and equipment as specified in the manufacture’s directions.
6. To report any maintenance defects to the housekeeper.
7. To hand in all lost property to your immediate supervisor.
8. To collect and deliver guest laundry to the rooms.
9. To report any complaints to your immediate supervisor.
10. To be familiar with, and abide by the rules and regulations detailed in the employee’s handbook.
11. To attend any training courses that the hotel management may deem fit.
12. To foster good relations with all hotel staff.
13. To attend departmental meeting when scheduled.
14. To assist in the laundry room upon request of your supervisor.
15. To carry out any other reasonable request of management.
CHAPTER FIVE

FOOD AND BEVERAGE
SUCCESSFUL FOOD AND BEVERAGE OPERATIONS

The food and beverage experience delivered to your guests can be the difference between a satisfied customer and a repeat guest. Guests often judge hotels by their restaurant and bar operations. Successful food and beverage operations are those which exceed the customer’s expectations whilst being profitable ventures for the owner.

For a new hotel with a restaurant to become successful, it must attract clients other than its in-house guests. This means that it must strive to be popular to guests staying in other hotels and to the local clientele.

In this chapter we shall be looking at some of the main considerations, which owners of small hotels might find it useful to consider in the planning, organising and monitoring their food and beverage facilities. These are:

- Identifying and meeting customer needs
- Types of food and beverage operations
- Planning the menu
- Setting prices
- Purchasing, storage, issue and control
- Food hygiene and safety
- Types of restaurant service
- Preparation of the restaurant
- The order of service and standards of performance
- Increasing food and beverage sales

- Wine and beverage service
- Improving working relationships and effective communication
- Job descriptions

IDENTIFICATION OF CUSTOMERS NEEDS

Compare any restaurant or bar that is full of customers, to one that is empty. What causes one restaurant to be busy and profitable and another to be empty and making a loss?

The main reason is the busy restaurant is providing customers with what they need and want. There are various ways to find out what customers want, the most effective and obvious way is to ask them! Be prepared to listen to their comments, not just hearing what you want to hear.

Ask Your Customers!

- Why did they come to your establishment?
- How did they hear about your establishment?
- What do they think of your present facilities?
- What did they like about the food and beverages offerings?
- What is their preferred style of service?
- What do they think of the atmosphere?
- Is it good value for the price?
- How do they feel about present services?
When you are aware of what could be improved, you can then begin to meet your guests’ needs.

Some other ways of receiving customer feedback are:

- Customer comment cards
- Looking at the sales mix of products - which items sell well and which do not
- Comparing the sales mix of standard menu offerings with nightly specials.
- Looking at the local competition, other restaurants and bars which are popular with similar types of guests staying in your hotel.

A typical customer comment card for a food and beverage outlet might look like the one overleaf.
WE VALUE YOUR COMMENTS

Dear Guest,

We would be grateful if you could spend a few minutes of your time to complete their questionnaire. Your comments will assist us to improve our service.

How do you rate the following - please circle your rating.
A = Excellent, B = Good, C = Satisfactory, D = Poor

<table>
<thead>
<tr>
<th>Menu choice</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choice of wines and beverages</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Decor/atmosphere of the restaurant/bar</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Greeting received</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Speed of service</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Efficiency of the staff</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Friendliness of the staff</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Quality of the food</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Temperature of the food</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
</tr>
<tr>
<td>Presentation of the food</td>
<td>A</td>
<td>B</td>
<td>C</td>
<td>D</td>
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<tr>
<td>Further Comments</td>
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</tbody>
</table>

Thank you for your time in completing this questionnaire - your views are most appreciated. We look forward to seeing you again soon.

Some form of motivation should be given to clients to complete these questionnaires.
TYPES OF FOOD AND BEVERAGE OPERATIONS

The type of food and beverage operation can now be planned to suit the customer needs. Such planning may include:

- The menu and range of beverages available
- The style of service
- The atmosphere - overall mood and ambience which includes:
  - Decor
  - Music
  - Lighting
  - Staff
  - Uniforms

First you should have a vision of what you want your establishment to be.

In a small operation it is very difficult to be “All Things to All People”

Know your core clientele’s needs.

It is no use having a gourmet restaurant where the majority of customers want simple or fast food.

On the other hand, if your guests wish fine dining, they will be disappointed if your restaurant menu consists of burgers and fries, and wine list comprises of “Chateau Plonk”!

TYPES OF MENU

A LA CARTE

This menu usually has a wide choice of dishes, for various courses and items are individually priced. There is an opportunity to increase “customer spending” with this menu, as higher priced dishes can be sold.

Nowadays many “a la carte” menus actually do include starch and vegetables for better perceived value.

TABLE D’HOTE (priced fixed)

This is a set menu at a set price, usually comprising of a small selection for each course and includes coffee. The benefit of this menu is that customers know what the total food check is going to be.

It also gives the chef the opportunity to change the menu daily, utilize food product thereby minimizing spoilage.

BUFFET

Buffets give the customers a wide choice of food items and allow visual display to assist them in their selection. The buffet also provides variety for the customers.

It provides the opportunity to try different themes and to vary from the standard menu fare.

It allows the chef to present his food in an attractive and appetizing way, and allows the kitchen to utilize food product.

MENU PLANNING

The menu is a sales aid in a restaurant. The menu will create the first impression of the meal to the guests. It should therefore be

- Visually interesting
- Attractively presented,
- Clean
- Neatly written, or printed.
Any menu should be planned with the following considerations:

**THE RANGE OF DISHES**
The menu should provide a variety of dishes, to make it interesting and appealing to customers. The aim is to have something on the menu which appeals to everyone, whatever their tastes, mood or appetite.

The range of dishes offered by the small operations, needs to be well planned, to avoid spoilage of food items and increased costs. The variety therefore should be limited to a choice of different flavors and textures of dishes.

**A VARIETY OF COLOUR, TEXTURE AND FLAVORS**
All meals should provide a range of colour, texture and flavors.

Consider the meal of white fish, creamed potatoes and white cabbage, all the items are the same in colour and texture and all the flavors are very light and non-descript.

A meal should have a mixture of complementary items.

**NUTRITIONAL BALANCE! SPECIAL DIETS**
With the increase in the attention to health and fitness today, people are concerned with the nutritional value of what they eat.

Menu items should therefore be planned which are low in calories, cholesterol and salt. This does not mean that all items need to be grilled and low calorie, some people may like to indulge a little on vacation. However, menus should provide a balance of protein, fat, carbohydrates, minerals and vitamins.

**LOCAL FOODS VS INTERNATIONAL FOODS**
Most visitors to the Caribbean do wish to try local food items, and may be disappointed if they are not available.

Local foods on a menu will always be popular to those who like to try new dishes. Using local produce will also reduce costs in many instances, support local businesses and promote Caribbean cuisine.

However, you need to consider the unadventurous guests and the need to provide a variety in the menu and ensure that a selection of international dishes is also available.

**RESOURCES AVAILABLE**
Menus need to be planned around the equipment available. Alternatively if a menu is deemed sufficiently important, plans need to be made to obtain the necessary equipment.

Planning menus when the equipment is not available to produce the foods, leads to operational problems.

Staff expertise also needs to be considered.
STANDARDIZED RECIPES
Standardized recipes
- List the ingredients, quantities, method
- Cost the price of dishes and work out the selling price
- Take a photograph of the finished dish

The benefit of producing standardised recipes are:
- Dishes are standardised
- They can be used as a training aid and reference for chefs and cooks in the kitchen
- Cost and wastage are reduced as the same quantity of ingredients are always used
- Portion sizes are controlled

PORTION CONTROL
Portion sizes need to be standardized to ensure customer satisfaction and to control costs.

Portion control also assist in achieving desired profit levels.

Portion control can be assisted by using standard recipes as well as having the correct equipment, such as:
- Recipe cards – costed out with exact measurements / weight of ingredients
- Measuring jugs
- Weighing scales
- Ladles and spoons
- Scoops and servers
- Putting markings to show the portion e.g. on gateaux
- Using “M/P” Market price on fresh fish and lobster so that you have flexibility, both with customer desires and pricing due to purveyor costs to you

Staff should be informed of the house policy on selling extra items and larger portions and the operation monitored to ensure that efficient portion control is actually taking place.

STANDARDIZED RECIPE SHEET
A Standard Recipe Sheet should include:
- Item Name
- Quantity (No. of portions)
- Total Cost
- Cost per Portion
- Food Cost Percentage
- Sales Price
- Preparation Method
- Picture (Photo)

SETTING SELLING PRICES
The selling price of food and beverage is important. It must be a price that the customer is prepared to pay but at the same time ensuring a reasonable profit margin.

A selling price of food and beverage should be set to provide a certain percentage of profit and a certain percentage cost. The main cost involved in serving food and beverage items is the food and beverage items.

The cost of the food in small operations should be no more than 30%, which means...
that a gross profit of 60% will be made. If the food cost percentage can be reduced, so much the better.

(Loss leaders – Look at your menu on the whole, it’s overall cost for example, lobster, might be so expensive that you would charge $50 to get to proper food costs. You can’t do that and it’s a popular item. But you also have a signature chicken dish that’s very popular and your food costs on it are 25%. Does it balance out?)

Once we know the food cost percentage we wish to achieve then we can calculate the selling price:

\[
\text{Selling Price} = \frac{\text{Food Cost} \times 100}{\text{Food \%}}
\]

For example, if we wish to keep the food cost percentage to 40% and the cost of producing a dish is $2.00, the selling price is:

\[
\text{Selling Price} = \frac{2.00 \times 100}{40} = \$5.00
\]

However this price might not be the price which you wish to charge, you may feel that you are able to obtain a higher amount or you may feel that the price for the dish is too high for the market.

Check average - if you are selling a great volume of wine which should be a very profitable aspect of any food and beverage operation, and liquor that can offset some food cost challenges.

The price can be adjusted to be in line with what customers are prepared to pay and what the local competition is charging. But it is essential to calculate the selling price, to ensure that prices are set at a level where a certain gross profit percentage can be achieved.

**FOOD & BEVERAGE CONTROL**

**BEVERAGE PRICING**

Beverages can be priced using the same method, however the gross profit which can be achieved from beverages is usually higher. In food, a gross profit of 60% (gross profit must be after food and labor costs) and a food cost percentage of 40% is likely to be able to be achieved. In beverages your gross profit should be nearer 75% or a 25% cost.

The control of food and beverages starts when the goods are ordered before they enter the premises - when they are ordered.

**PURCHASING**

The aim of effective purchasing is to buy the goods at the right price, in the correct quantity, in the right quality required, as and when you need them.

**CHOOSING A SUPPLIER**

A supplier is chosen to meet the needs of the buyer. This means: the goods are available at the right price, in the correct quantity and quality.

But other considerations should be taken into account when choosing a supplier, such as:
DELIVERY TIMES
The lead time between the time of ordering and the time of delivery

RELIABILITY
Consider the following:
- The range of products which the supplier has on offer.
- Arrangements for emergency ordering.
- Credit terms offered

BACKHANDERS / KICKBACKS
Many suppliers give cash discounts or “free” goods to the purchaser. Some of these can be favorable to the operation. For example, if it results in lower food and beverage costs for the operation or the staff receive incentives to sell more of a beverage item as a promotion.

The back-handers or kickbacks should be strictly controlled though, to ensure that the person ordering is not getting personal gains from the company. Care must be taken to ensure that the supplier is not being used because of the incentives which he offers only.

This could result in a more expensive or less efficient supplier being used, purely for the kickbacks they give.

SUPPLIER SERVICES
Suppliers will often provide further services to purchasers, such as blank control forms.
Wine suppliers will often help create a wine list and sometimes even print it. They will train wine service staff and provide sales and promotion suggestions.

MINIMUM ORDERS
Many suppliers have minimum orders and for smaller operations this means a large amount of food and liquor in stock which is both space consuming and costly.

ORDERING - HOW OFTEN?
Perishable food items need to be purchased daily or every other day, so that the food items are of the highest quality and wastage does not occur. Use local vendors where possible; give them your specifications and develop special relationships with growers.

Most establishments order liquor on a weekly basis. This usually allows for the movement of stock and ensures that the operation does not run out of particular brands.

PURCHASE ORDER FORMS
Should be used to:
- Avoid unauthorized ordering.
- Help the person receiving the goods to know what is to be delivered.
- Avoid misunderstanding between the supplier and the orderer.
- Assist the accounts or control department in checking invoices.

The purchase order form should be completed by the person ordering. It should then be passed to the manager to authorize. The purchase order number shown on the form should be quoted to the supplier. The supplier should be instructed not to accept any orders without a purchase order number. The purchase order should show
price and quantities ordered plus an accurate description of the item(s).

**DELIVERY**
It should be arranged for the delivery to be done at the same time, on the same day each week. This is so that busy times, such as lunch time, can be avoided and the person responsible for receiving the goods can be available.

When the food or liquor is delivered, a delivery note should accompany the goods. The goods should be checked for quality, quantity and price. The purchase order form, delivery note and actual goods delivered should all match. Any discrepancies should be written on the delivery note and the purchase order form, and then signed by the person receiving the goods.

The delivery note should never be signed until it is certain all the goods are present, in the correct size and quality.

**PURCHASE ORDER FORMS**
Examples of these forms will be included in the appendix.

**HOW MUCH TO ORDER?**
For the small hotelier the quantity of food and beverage needs to be kept to a minimum. Excessive buying will lead to perishable food being wasted. Order quantities are especially important when dealing with liquor, because of the high cost of the beverages. Liquor in store room is money tied up. Stock should be kept to a minimum.

On the other hand, it is important to not run out of stock as this will result in loss of sales and will create a poor image to customers when items are not available.

**BEVERAGE REORDER**
There are a few ways of determining the reorder level.

**PAR STOCK**
This involves setting an average stock level that the establishment wants to be in stock. Each week the replacement order brings the level back up to the set level. The level set for each beverage is calculated by looking at the usage or consumption of the beverage, the lead time between ordering and delivery and the amount of “buffer” stock the establishment wishes to hold.

1. If for example the weekly consumption of Bells whisky is 7 bottles.
   2. It takes 2 days from ordering the whisky to it being delivered. How much should the establishment set as the par stock?
      This can be calculated by Weekly consumption + usage during the lead time + a buffer
      7 bottles + 2 bottles + a buffer of 2 bottles = A par stock of 11 bottles
      This means that the amount of whisky ordered will bring the stock level back up to 11.

      So if there are 2 bottles in stock, 9 bottles will be ordered, if 4 bottles in stock, 7 bottles ordered.

      The par stock can be altered as the level of business changes.
PRICING
The par stock system has the advantage of keeping stock levels controlled and makes calculating reorder levels easier. One problem with the system is that it does not take partially used bottles into account.

Bin cards for each item assist in knowing how much is in stock and is useful for stock control purposes.

A sample bin card can be found in the appendix.

FULL BOTTLE REPLACEMENT
Bar requisitions should be made daily to bring the bar back to its “Par” level. New bottles should be issued whenever an empty bottle is produced.

Each day the bar saves all the empty bottles and these are replaced with new ones. Empty bottles should be disposed of to avoid them returning to the bar. Care must be taken to ensure that the barman does not bring in empty bottles from off property and take full ones as replacements.

Always sign or stamp your labels

STORAGE
Efficient storeroom inventory is vital to prevent pilferage, to ensure goods are accessible when needed and to ensure quality.

Food and Beverage items should be stored in cool, dry, well ventilated stores.

The location of the storage area should be close to the delivery point, the kitchen and the bars for ease of operation.

Well organised storage areas and regular cleaning are essential.

New stock should always be placed at the back of old stock to ensure that correct stock rotation is achieved.

RECEIVING
Wine and beverage stock can be easily be pilfered and are attractive items to steal.

This means that the person in charge of ordering needs to be present at the time of delivery. Once the goods are accepted by the person receiving them the responsibility moves from the supplier to the hotel.

Before accepting the goods, the following checks should be made:
1. Obtain the purchase order form from the file.
2. Check that the brands, size and quantity of bottles/cases correspond with the order, as written on the purchase order form.
3. Make sure the invoice price agrees with the quoted price or order form.
4. Sign the supplier’s copy of the invoice
5. Date each case, so that stock rotation can be done.
6. Obtain credit notes for any breakages or shortages, and record on the invoice before signing.

All “free” bottles should be recorded on the invoice and the purchase order form, invoices and credit notes given to the control department.

*For a copy of a Purchase Ledger of Goods Received Report - please see appendix
STOCK-TAKING / INVENTORY
Regular stock taking will enable food and beverage costs to be controlled and ensure that the gross profit is achieved.

The physical inventory should be counted weekly or monthly and the value calculated on the purchase price of the items.

To calculate the consumption by month, you must begin with the value at the beginning of the month i.e. the value of the opening stock, add to this the value of purchases made during that month. Then subtract the value of the closing stock at the end of the month. This amount is the consumption during the month and should equal the cost of sales.

For a copy of the Stock Taking Form, please see appendix

FOOD HYGIENE AND SAFETY

WHAT IS FOOD HYGIENE?
Food hygiene is the action taken to ensure that food is handled, stored, prepared and served in a way to prevent the contamination of food and food poisoning.

Deaths occur every year from food poisoning and millions of others suffer from: nausea, vomiting, diarrhoea, stomach pain, and dehydration.

The most common cause of these illnesses is food poisoning bacteria. The control of these bacteria must be a major concern of all food handlers.

Bacteria - In order for bacteria to grow it needs

- FOOD
- MOISTURE
- WARMTH
- TIME

THE ROLE OF FOOD
Bacteria, like us, need food to grow. The food poisoning bacteria grow best in all foods which contain meat, poultry, milk, eggs or rice.

THE ROLE OF MOISTURE
Moisture is essential for bacteria. Dried foods such as powdered milk do not allow the growth of food poisoning bacteria.

THE ROLE OF WARMTH
The food poisoning bacteria like warmth and grow best in food which is near the temperature of the human body - 98 F.

Nevertheless, they can grow in both cool and hot conditions - ranging from 50 to 120 degrees Fahrenheit.

THE ROLE OF TIME
Bacteria need time to grow in the food. However, 70,000 million bacteria can result from one cell after only 12 hours.

HOW DOES FOOD BECOME CONTAMINATED WITH BACTERIA?
- Food handlers and their clothing
- Raw and contaminated food, especially meat and poultry may come into direct contact with uncontaminated food.
- Work surfaces and equipment may contaminate food.
- Animals and insects may contaminate food.
HOW HOTEL STAFF CAN CAUSE FOOD POISONING

- Sneezing or coughing over food
- Picking ears, nose or teeth
- Biting fingernails
- Scratching head
- Smoking or spitting
- Licking fingers
- Not washing hands after going to the toilet
- Not washing hands after touching raw meat and poultry
- Storing raw meat and poultry together
- Not cleaning work surfaces or equipment
- Leaving food out in a warm atmosphere

FOOD HYGIENE IS MORE THAN JUST CLEANLINESS - IT INVOLVES:

- Protecting food from risk of contamination, including harmful bacteria, poisons and foreign bodies
- Preventing bacteria present from multiplying to an extent which would cause illness and food spoilage
- Destroying harmful bacteria by thorough cooking
- Protective wear

RESTAURANT SERVICE

There is a variety of types of service which can be used in your restaurant.

SILVER SERVICE

Food is brought from the kitchen on silver trays, to the restaurant, and the waiter serves the dishes from the trays onto the customer’s plate, at the table.

PLATE/SILVER SERVICE

This is a combination of two forms of service. The meat/fish dish is plated in the kitchen and the waiter serves the vegetables and potatoes from silver (or similar) dishes.

PLATE SERVICE

Food is served to the customer on the plate. It enables speedier service than silver serving and less equipment is required.

FAMILY SERVICE

The main dish is plated, with the vegetables and potatoes placed in the centre of the table for the customers to help themselves.

It is often used for large functions, when only the minimum staff are available.

Another variation of family service is when the host plates the main course for his guests and the guests help themselves to the vegetables and potatoes.

FRENCH SERVICE

The plates are placed in front of the customer and the dishes are presented in trays to the customer, so that they can help themselves.

GUERIDON SERVICE

Food is served to the customer from a side table or trolley. It involves the waiter filleting, carving, flambeing and preparing and cooking dishes at the table.

BUFFET OR CAFETERIA SERVICE

The customer collects a tray from the beginning of the buffet and moves along to select his meal, pays, and then collects the
cutlery. It is aimed at speed of service.

Free flow operations are now being used to ease faster service, where there are a number of service points, each serving a different type of food or beverage.

ATMOSPHERE
PREPARATION OF THE RESTAURANT FOR SERVICE

Why is the preparation of the restaurant important?
Customers get their first impression from what it looks like on the outside as they arrive- and first impressions last!

The customer will notice whether the building is well painted, attractive and clean and whether the menu display is attractive, and has a good description of the dishes.

As people step into the restaurant they will notice the atmosphere and mood of the interior design. The atmosphere will vary between restaurants depending on the type of restaurant it is.
Setting of the restaurant the position and views will determine the mood and atmosphere.

A sea view will help to create a peaceful, restful atmosphere, whereas a restaurant in a busy city centre overlooking the street will create a lively, sociable atmosphere.
Dark, warm colors create a restful atmosphere - romantic and peaceful, whereas light bright colors create a stimulating, lively atmosphere. Compare McDonald’s or KFC colour schemes to the colour scheme of an a la carte restaurant - different moods are being created.

Table layout will affect the atmosphere
Booth seating
Individual tables of 2/4
Long rectangular tables
Large round tables

Space
The space between the customers tables will help to create mood. For example if they are secluded and well spaced out it will create a romantic, peaceful atmosphere but in other restaurants they place the tables close together to create a party or livelier mood.

Views
Maximize views, and where a predominant view does not exist use a restaurant focal point. Use plants and other objects d’art.

Lighting
Subdued lighting creates intimacy and a subdued atmosphere, especially with the use of candles. Bright lights are used in restaurants that desire a quick turnover of customers.

Temperature
Air conditioning, and the weather in outdoor
restaurants, all aid in the creation of mood.

**Equipment**
The restaurant equipment used, such as the china, service ware, table cloths, napkins will all contribute to the decor of the restaurant. When linen, silver service ware and china are used this creates a formal atmosphere. Paper napkins are used in a more informal setting.

**Uniforms**
Staff uniforms will affect the atmosphere. If staff are dressed in smart uniforms and aprons, a more formal atmosphere is created than if staff are dressed more casually.

The presentation and appearance of the food service staff will create an impression on the customer.

You must decide what you wish it to be! It is important to match the uniform to the meal period and style of the event.

**BOOKINGS/RESERVATIONS**
These should be taken whenever possible to maximize revenue.

This will enable the kitchen and restaurant to be able to plan and organize for the amount and type of customer requests. It also avoids customers being disappointed in case there is no table or requests that cannot be met.

You may wish to keep a reservation book or use the suggested restaurant bookings form. For an example of a Restaurant Booking Form please see the appendix

**ORDER OF SERVICE IN THE RESTAURANT**
The order of service and service procedures should be set so that all staff are aware of them and they can always be followed. The order of service will vary slightly from one establishment to another but a good guide to follow is outlined below.

1. Host/ess escorts guest/s to the table.
2. Waiter draws out the chair for guest (ladies first) and then Host/ess introduces the waiter to guests.
3. Head waiter and waiter unfold napkins and put on to guests knee.
4. Waiter should welcome the guest whilst seating the guest; using names if possible.
5. Give guests a menu to look at.
6. Offer bread rolls and water.
7. Explain menu to the guests.
8. Take the order using sequential numbers. (See separate note)
9. Change cutlery - that is ensure the customer has the correct cutlery in front of him to eat his meal and that he has no surplus cutlery.
10. Take tray, go to kitchen with the top copy of the order.
11. Give the order to the cook.
12. Serve the first course
   a. Cold food before hot
   b. Ladies before gentlemen
   c. Seniority of age
13. Serve accompaniments, take bottom copy of the check to the cashier.
15. Take tray to collect the main course. Ask for the order by table number, be sure to allow any kitchen finishing time needed in pick up. A busy a la carte restaurant will use “fire and pickup”. e.g. “May I have the main course for table number 1 please chef’ (But do not lean over the customer)
16. Waiter leaves kitchen with main course.
17. Waiter serves main course and any accompaniments.
18. Waiter offers more water and asks if everything is to the customer’s satisfaction.
   “Is everything all right with your meal Mr. Brown/Sir”
19. Waiter clears plates and side plates when all the guests at the table are finished.
20. Takes plates on trays to kitchen.
21. Waiter removes salt, pepper and butter using a side tray. Remove water glasses if the guest has finished.
22. Waiter crumbs down and brings down spoon and fork. But do not lean over the customer.
23. Waiter presents the menu again, explains the desserts and takes the order.
24. Waiter takes top copy of the check to the kitchen and orders desserts.
25. Waiter serves dessert and takes the bottom copy of the check to cashier.
26. Waiter clears dessert and takes plates on tray to the kitchen. Clear any empty glasses.
27. Waiter puts sugar with spoon at the side of the plates on the table and ashtray.
28. Waiter serves coffee from the right asking the guest if they would like their coffee with or without milk/cream.
29. Waiter presents the check, and when he sees the guest has put the money on the plate, picks up the check and money, check or credit card and take it to the cashier.
30. When customers leave the table the waiter escorts them to the door, asks if everything was all right with the meal and would they like to book again. Hold the door open for the customer on their departure and say good-bye and that we look forward to seeing them again.

Note: Several selling and upselling opportunities exist throughout the meal. Be sure staff are aware of and have tasted specials etc. and are knowledgeable on wines and after dinner drinks.

INCREASING FOOD AND BEVERAGE SALES
Small hotels can use a variety of techniques to increase food and beverage revenue. The aim is not only to attract more people to dine in the restaurant and drink in the bar, but also to maximize sales from every customer.
These techniques include:
- The menu
- personal selling
- advertising
- merchandising
- promotion

SUGGESTIVE SELLING
Suggestive selling encourages guests to buy
certain items by the seller directing the guest into a choice. This calls for tact on the part of servers. Waiters and waitresses must be knowledgeable of all items on the menu.

Many guests do appreciate some assistance but if a guest has made up his mind, do not try to change it by telling him what he wants.

Suggestive selling helps to sell more profitable items and increases the average “spend” per guest. The food and beverage server can describe certain dishes on the menu and make recommendations to the guest.

He might recommend a special on the menu for that session or a particularly low cost dish on the menu, that achieves more profit than other dishes.

Alternatively, the waiter can suggest a particularly nice wine to complement the guest’s choice of dishes. The wine can be a more expensive wine, or one that achieves a high profit margin.

When taking drink orders the waiter can suggest drinks, such as cocktails, rather than just asking what the guests would like to drink.

**ADVERTISING**
Advertising can be done locally through magazines, dining guides, radio or TV.

For the small hotelier the cost has to be the main consideration. The amount of increased business which advertising brings in, compared with the cost of the advertising. Whenever advertising the key is to remember Aunt AIDA!

**Attention:** An advert should draw peoples attention- be bold or bright

**Interest:** Sound or look interesting to the reader so they want to know more - sell the benefits of your establishment

**Desire:** Make the reader feel that they cannot do without your products - they would be missing something

**Action:** Allow the person to take action: provide the name and telephone number for the restaurant.

**MERCHANDISING**
Merchandising is the way in which your food and beverage products and services are presented.

Merchandising therefore includes:
- menus
- wine lists
- the signs and display boards
- the decor
- staff uniforms
- the food and beverage products themselves

The impression the restaurant makes on your guests will sell effectively or not!

**PROMOTION**
Promotion of food and beverages means special offers or products which entice customers to purchase.

These can be a
- special theme evening
- a special wine of the month
- two meals for the price of one
- free children’s meals
- happy hour
- free speciality coffee when dining

Promotions attract peoples’ attention and make them wish to use your facilities. It is a
technique used primarily during quiet periods.

Good product knowledge by the staff will enhance all sales. This knowledge is the result of training which must include staff sampling food items on the menu.

**BEVERAGE SERVICE**

The range of beverages available in the small hotel needs to be kept small, due to the cost of having a wide product range and the size of storage areas needed. However, a wide enough range to suit guests’ needs should be provided. This is likely to include a range of:

- Beers
- Spirits. Scotch, vodka, gin, rum
- Liqueurs. Drambuie, Grand Marnier
- Non-alcoholic drinks. Fruit juices and punch, mineral waters, tonic and sodas
- Wines
- Fortified wines. Vermouths

**WINE LISTS**

The wine list should be prepared with the individual restaurant and menu in mind and the wines chosen to complement the dishes on the menu.

For the small hotel the wine list needs to be kept small but include a selection of:

- White wine
- Red wine
- Rose wine

These wines should come from a few different countries, such as America, France, Italy, Germany, Australia, Argentina, and Chile and South Africa.

Most wine suppliers will assist with the production of wine lists and give advice on the selection of wines and sometimes staff training in product knowledge.

Remember it is not always necessary to buy a case. Individual bottles can be purchased.

**PRESENTING THE WINE LIST**

The wine list is offered, usually after the food order has been taken, since wine is usually drunk to complement food.

Present the wine list open - and do not leave the table straight away as people may want some help in choosing a good wine.

European Wines are usually listed by area, American and Australian Wines by variety with the white wines of one area first followed by the red wines of the area. Sparkling wines and champagnes are usually shown on the first page.

**RECOMMENDING WINES**

Recommended wines requires experience and knowledge of the wine list.

Wine is often drunk to complement the dishes chosen. The following dishes are normally accompanied by these wines:

- Fish - Dry white wine, such as Chablis
- Cold chicken - Dry white wine
- Roast poultry - Light red wine, such as Beaujolais
- Red meat - Red wine, such as Claret and Chianti
Desserts - Sweet white wine, (such as Sauternes or German sweet wines)
Cheese - Red wine or port

But many guests have preferences towards the type of wine they prefer, such as white, red, rose, dry or sweet.

When recommending wine it is advisable to ask the customer if they would like white, red, dry or sweet wine and then you can recommend a wine which they will enjoy.

BEVERAGE SERVICE
SERVING TEMPERATURE OF WINE
Frequently red wine is served too warm, and white wine is served too cold. (room temperature in France is not 80 degrees)

The temperature of the wine is important so that it can truly be appreciated.

- Champagne 40 F Chilled
- Sweet white and rose 43 - 47 F Cooled
- Dry white-45 - 50 F Cooled
- Burgundy - Young red 55s-60F
- Bordeaux - Old red wine 60 - 65 F

ALL wines should be stored in a cool dark cellar at a constant temperature of 50 - 57 F.

WINE
Always offer the wine list - open on the page of the most expensive wines. Do not leave the table as the guest may require advice - not knowing the wine list.

OPENING RED & WHITE WINE
Most wine waiters use either the lever type (waiter’s friend) or the French boxwood corkscrew. Correct use allows the cork to be drawn smoothly and quietly with no fear of breaking the neck of the bottle. Here is how it should be done:
   a) Cut through the foil around the top of the bottle neck and remove the foil only as far as the flange. This will ensure that when the wine is poured it does not come into contact with the foil.
   b) Wipe the neck of the bottle with a clean napkin to remove any seepage.
   c) Insert the corkscrew and turn clockwise, four spirals, (not right through) the cork or pieces may fall into the wine. Use leverage on the bottle’s neck rim to withdraw the cork. Note - Some corkscrews have 4 and some 5 spirals.
   d) Holding the bottle steady wipe the inside of the bottle neck with a clean napkin.
   e) The cork now removed from the corkscrew should be presented to the host on a coffee saucer or small plate.
   f) The wine may now be served. Pour a little into the host’s glass, he will sample the wine to satisfy himself that it is in good condition and it is at the correct temperature, when the wine has been approved serve to the ladies on the right of the host and then serve the gentlemen until the host is reached again.
   g) Fill each glass 1/2 to 2/3 full to allow the full aroma of the wine to reach the customer. As you pour the wine twist the neck of the bottle on completion, to prevent the wine dripping. Note - Ensure you have the appropriate type of wine glass for each wine.
WHITE WINE AND SPARKLING WINES
Place in a wine cooler with a mixture of ice and water. White wine should be served chilled at a temperature of 45 - 50°F. Ensure the wine does not get too cold.

LIGHT RED WINES AND ROSE WINES
Young or light red wines and rose wines are normally served at cellar temperature which means they will be slightly chilled 55° - 60°F

FULL RED WINES
Normally served at room temperature 60 - 65°F

SPARKLING WINE
There are many varieties of sparkling wine, the most famous being Champagne. 40°F is a good service temperature

SERVICE
1. All sparkling wines should be served into a flute glass to retain the bubbles, never into a champagne saucer.
2. Ensure the wine is well chilled and not shaken.
3. Take wine to the table in an ice bucket with a stand.
4. Present the wine to the guest.
5. Remove the foil and mesh surrounding the cork.
6. Hold the cork and the bottle and TURN THE BOTTLE. A cloth or napkin can assist in this process.
7. The wine should not pop, but sigh.
8. Place your thumb in the punt (inverted dent at bottom of the bottle) and fingers up the bottle, and pour as for normal wine, but slower.
9. If the wine is lively, persevere by pouring slower and waiting at each guest until the glass is 2/3 full. Do not leave and return later.

WHAT EVERY COCKTAIL BAR SHOULD HAVE:
1. Cocktail shaker
2. Mixing glass and spoon
3. Spirit measures
4. Ice bucket and tongs
5. Hawthorn strainer
6. Corkscrew
7. Can opener
8. Bottle opener
9. Fruit squeezer
10. Fruit knife and board
11. Swizzle sticks
12. Coasters
13. Serviettes/Napkins
14. Soda syphon/Soda water
15. Salt and pepper
16. Nutmeg
17. Cinnamon
18. Glass cloth
19. Cocktail sticks
20. Bottle stopper
21. Oranges
22. Lemons
23. Maraschino cherries
24. Olives
25. Cocktail onions
26. Straws
27. Ice crushing machine
28. Assorted bitters - peach, orange, Angostura
29. Hot pepper sauce
30. Service trays
ROOM SERVICE

Serving food and beverages in the rooms is an added service to guests and can lead to increased revenue. However, for the small hotel to be able to offer this service, it must ensure it has the resources (including the right equipment) available to provide an efficient service.

EQUIPMENT

Trays for carrying the food to rooms are essential equipment, as are covers for the food to keep the food warm, dry and free from insects.

Other necessary items which the guest will need include:
- salt and pepper shakers
- cutlery
- napkins.

The lay-up of the trays is important to provide good service. If items are forgotten the customer will be kept waiting and it means extra time and effort for staff.

ROOM SERVICE MENUS

Menus need to be provided in the rooms and these need to provide a selection of dishes for the guests. Often the Room Service Menu will be a selection of your regular menu.

TAKING ORDERS

There must be clear instructions on how to order room service in the guests rooms.

This is normally done by telephoning the restaurant in small hotels. Alternative arrangements need to be made if room service is to be offered at times when the restaurant is closed. Kitchen staff will also need to be on duty throughout the times room service is offered.

Orders are usually placed by telephone and staff must be trained in how to take the orders effectively. Be sure to get the guest’s name and room number first; then use the guest’s name throughout the order taking process.

Orders should always be repeated to ensure they have been taken down correctly. State how long the order will take.

SERVING ROOM SERVICE

Room service checks should be prepared and taken to the room for the guest to sign, the waiter should always take a pen.

The tray should be attractively presented and all the items needed present.

A check list for staff can assist them in remembering all the items needed. Pre-set the trays whenever possible but especially for breakfast.

The order should be served no longer than 30 minutes after placing the order. If it is going to be any longer or there is a problem the guest needs to be informed and apologies made.

All hot food must be served “hot” and should be taken promptly from the kitchen when cooked. Systems coordinating these needs must be developed and in place.
CLEARING TRAYS
A record of room service trays needs to be kept by the food service staff. This is so that trays can be collected from the rooms.

There is nothing worse than dirty trays left in rooms or out on the corridor. Staff could ask the guest to phone down when they want the tray collected or call back after a suitable period of time.

Note - If late at night, avoid going back until morning unless the guest requests it!

EFFECTIVE WORKING RELATIONSHIPS

COMMUNICATION
Effective communication between the food and beverage staff and staff from other departments is essential.

Between the kitchen and food service
- the menu - special dishes available
- food orders
- number of guests
- timing of service
- special requests
- customer comments between the bar and food service
- specials
- drink orders
- range of drinks available between the bar and kitchen
- specials
- drinks for menu items
- the menu to describe to guests in the bar

Between departments and the front office
- preparation of bills
- charges to guest rooms
- paying in of cash payments
- information on the food and beverage facilities to tell guests

Between departments and housekeeping
- clean linen and laundry
- clean uniforms and laundry of uniforms
- kitchen cloths, towels

METHODS OF IMPROVING COMMUNICATION
Communication and cooperation can be improved by the small hotelier ensuring that effective communication systems are in place. Some of these may include:

- Food and beverage ordering procedures- using written duplicate order pads so that the kitchen and bar has a written record of orders for the preparation of the food and for cashiering purposes.
- Weekly staff meetings where staff have the opportunity to discuss problems and suggest ideas for improvement
- Daily food and beverage meetings, where the staff can discuss the service and ways it can be improved.
- Pre-service briefings, where the kitchen can inform the service staff of daily specials, items on the menu out of stock and the restaurant can inform the kitchen of special requests, number of customers etc.
- Weekly forecast of room sales and any functions or parties booked
provided for the kitchen, bar and restaurant, so that the departments can be planned and organised in advance.

- Linen and uniform issuing forms, so the food and beverage department can order their requirements from housekeeping.
- Cashiering-restaurant control forms.

See examples in appendix.

JOB DESCRIPTION

FOOD AND BEVERAGE SERVER

Job Purpose
To promote and serve food and beverages to customers in a polite and helpful manner, ensuring 100% guest satisfaction.

Main Duties
1. To report for work at the times shown on the roster
2. To dress in the uniform provided and have a neat and clean appearance
3. To work in a safe and hygienic manner at all times
4. To prepare the food and beverage areas ready for service
5. To serve food and beverages to customers, in the manner laid down by house procedures
6. To promote good guest relations by being helpful, friendly and polite to the guests
7. To suggestively sell food and beverage items whenever possible
8. To promote a good image of the establishment both inside and outside the premises
9. To ensure complete customer satisfaction and to deal with customer complaints and inform management of all customer comments
10. To liaise and work well with the food and beverage service team, kitchen and staff from other departments in a professional and efficient way
11. To attend training as required
12. To attend and participate in weekly meetings with the department
13. To close-down and clean the food and beverage areas as required and according to the house procedures
14. To serve food and beverage to customers in other areas of the hotel as required
15. To take payment for food and beverage items or ensure charges are made to guest rooms. Being responsible that all payments are received by the cashier.

Occasional Duties
1. To balance food and beverage sales at the end of each shift
2. To assist in the preparation of food and beverage items
KITCHEN ASSISTANT

Job Purpose
To prepare and cook food in the manner laid down by house procedures in a safe and hygienic way. To work closely with the dining room staff to ensure 100% guest satisfaction.

Main Purpose
1. To report for work on time, according to the roster
2. To dress in the uniform provided and have a neat and tidy appearance at all times
3. To work in a safe and hygienic manner at all times and ensure the kitchen is a safe and hygienic working environment
4. To clean and tidy the food production areas and ensure the cleanliness of the areas during working shifts
5. To prepare and cook foods on the menu, in the manner laid down by house procedures
6. To ensure that all food prepared and produced is of a high standard and leads to customer satisfaction
7. To liaise and work well with the other kitchen staff, food and beverage service staff and staff from other departments
8. To order from the storeroom and store food items in the correct manner and according to house procedures
9. To ensure portion control and minimum wastage in food production, to ensure costs are kept to a minimum
10. To suggest ideas for improvement in the food production areas to management
11. Any other reasonable request by management
HEAD CHEF/COOK

Job Purpose
To ensure food is produced to a high standard, in a safe and hygienic manner and according to house procedures to work closely with the dining room staff to ensure 100% guest satisfaction.

Main Duties
1. To set an example in terms of punctuality, personal appearance and professionalism, to the rest of the kitchen and food and beverage staff
2. To prepare the work rosters for the kitchen staff to ensure that all shifts are adequately covered
3. To maintain health and safety in the kitchen and to report any faulty equipment to management
4. To ensure safe and hygienic working practices in the kitchen
5. To plan the menus, in liaison with management
6. To ensure that standard recipes are developed for all dishes produced in the kitchen
7. To ensure that all food is produced according to standard recipes and is of the required standard and portion size
8. To organize the kitchen and the staff, so that daily work is allocated effectively
9. To ensure that kitchen costs are controlled and kept within budget
10. To carry out monthly stock-taking of food items in storage and report quantities to management
11. To ensure purchasing, storage and issuing of food items are carried out efficiently and according to house procedures
12. To train and develop kitchen staff and encourage them to increase their skills and further their careers within the industry
13. To promote a positive image of the establishment both inside and outside the premises
14. To do performance reviews, coach, counsel and discipline staff as necessary.
FINANCIAL MANAGEMENT

Sound financial management is a vital part of running a successful business. No matter how busy or popular an establishment may be, the bottom line for measuring success is profitability.

It is the very reason for which commercial businesses exist, and planning, controlling and analyzing costs and sales are crucial steps for succeeding in business.

The profit motive however, must be controlled. Customers must see that they get value for money. This means setting realistic prices and profit targets based on customer expectations and competition as well as financial criteria.

Managers and owners of small hotels must link their knowledge of accounting and financial management to the principle of providing a service and environment, which meets the needs of customers, owners and staff. Provide an environment where repeat business will be built.

Managers in the hospitality industry have both social and financial responsibilities towards their establishment. They are expected to ensure excellent customer service and at the same time maximize the profitability without losing sight of their establishment’s mission goals and objectives.

This chapter provides a brief introduction to key issues of financial management of a small hotel. The recommended texts will give more in depth coverage, and CHTI can provide relevant training in the financial aspects of running a small hotel.

In a small hotel as in any other business, it is necessary to record, classify and summarize financial information commonly known as “bookkeeping”. This is done by using a “uniform system of accounts”, which allows the financial information to be organised and presented in a standardized format. This in turn makes it easier to communicate the information about the business performance—known as “accounting”.

The financial statements which are prepared to present the financial data to interested persons and institutions are:

A Balance sheet: This financial statement gives a snapshot of the financial position of the business on a specific date

Income Statement: This financial statement shows the operating results of a business for the period ending on a specific date

BOOK-KEEPING

For many small hotels simple bookkeeping is all that is done. This involves recording, classifying and summarising financial information in various books consisting of:

- General Journal
- Cash Receipts Journal
- Cash Payments Journal
- Sales Journal
- Purchase Journal
CONTROL SYSTEMS

Every business must have a system of control. This should consist of protecting and controlling the cash resources of the business. This is done through use of:

- Cash Control
- Revenue Control
- Expenditure Control
- Fixed Asset Control

USERS OF FINANCIAL STATEMENTS

Many entities may be interested in the financial statement of the business. These include, but are not limited to the following:

- **Owners:** Every hotel owner wants to know whether the business is profitable. In addition, their concern is in knowing what their financial resources are and if they have made appropriate decision in managing their investment.

- **Managers:** Must have some form of control of the business by developing plans for the future (e.g. preparing budget) evaluating the performance of the business and analyzing the results.

- **Lenders and Creditors:** Their interest lies in assessing the credit worthiness of the business so as to make decisions regarding the providing of goods on credit or lending money.

- **Government Agencies:** Their interest is in the revenue generated by the business since it is a source of funds for the government. Hotels are required to pay taxes, so for this reason government agencies have a particular interest in the financial statements in order to calculate the amount of tax to be paid.

- **The Community:** The hotel operation is a source of employment in the community and supplies a service. The success or failure of any hotel has a significant economic impact on the community.

FINANCIAL STATEMENTS

When one is able to identify with and understand the main components of financial statements, (i.e. the Income Statement and Balance Sheet), one will be more able to comprehend the main reason for preparing them. An income statement is prepared so as to show whether the business has made a profit or loss by looking at the income (revenue) in relation to costs (direct and indirect) of operating the business for a given period. The Balance Sheet, on the other hand, shows the financial position of a business at a specific point in time.

The Income Statement

In any type of organisation, income is required from one or more sources to finance the activities of the organisation, which till then incur costs. Costs, which are expenses, include such items as the purchasing of ready made goods such as beverages for the bar, food items for the restaurant, buying equipment - a refrigerator for the kitchen, paying expenses such as wages and salaries for the employees, fuel and so on.
An income statement shows the type and amount of revenue (income) and expenses and the resulting net profit or loss, after deducting expenses from revenue.

A net profit occurs when the resources received for the sale of goods and services (revenues) exceed resources spent in acquiring the revenues. In short, net profit is when revenue exceeds expenditure.

A net loss occurs when the resources used up in realizing the revenue exceeds the revenue received, that is, when expenditure exceeds revenue.

The Income Statement can be used for
1. Comparing sales on a monthly or yearly basis
2. Comparing results of the present year with past years and with budgeted forecasts
3. Comparing the results of each department so as to identify departments that are operating most efficiently
4. Calculating profitability

The income statement format for the hospitality industry divides the statement into three sections.

1. **Gross Income** This is the total income of all departments
2. **Net Income or Gross Operating Profits** This consists of direct and indirect cost (expenses), controllable by the department manager, and which are allocated entirely to the department so that if the department is no longer operational these will no longer be expenses. How efficient the department manager is in controlling and managing the department’s resources will be clearly exhibited in this section of the income statement.
3. **Net Profit** In this section, cost not directly traceable to the department (such as administrative expenses, utilities, loan interest, insurance etc.) will be deducted from the gross operating profit. These costs will still be paid even if a particular department is closed down

**FINANCIAL PLANNING**

Planning must be structured, and realistic targets should be set on daily, weekly, monthly and annual bases. Long term planning should also be considered, with targets set for five to ten years ahead.

All plans should be formulated with the assistance of relevant staff members, if they are to fully accept their targets. Staff may then be held accountable to those targets, and bonus schemes could be considered for those who reach or exceed their goals.

**COST VOLUME PROFIT ANALYSIS**

This may also prove to be a valuable tool for the small hotelier, when undertaking financial planning. Questions about net income to be obtained at certain levels of sales, extra sales revenue necessary to cover capital expenditure and achieve a set profit,
by how much sales need to be increased in order to cover payroll increases, can all be answered using this technique.

Information can be presented in the form of a graph or by using the CPV formula, which in its basic form, allows a break-even point to be calculated:

\[
\text{Selling price per unit} - \text{variable cost per unit} = \text{contribution} \\
\frac{\text{Fixed costs}}{\text{Contribution}} = \text{break-even point (units)}
\]

Example: A hotel bar has fixed costs of $2200 per month, and variable costs of 55% of sales reserve. The average customer spends $2.80.

Calculate how many customers are needed per month to break-even.

\[
2.80 \times 55\% = 1.54 \\
2.80 - 1.54 = 1.26 \\
2200 : \\
\frac{1746 \text{ Customers}}{1.26}
\]

COST VOLUME PROFIT ANALYSIS

If the fixed costs increase to $2,500 in the following month, the effects can easily be calculated:

\[
2500 : \\
\frac{1984 \text{ Customers}}{126}
\]

If the bar wishes to make a profit of $600 per month, then the required number of customers is simple to calculate:

\[
\frac{\text{Fixed costs} + \text{required profit}}{\text{Number of customers to achieve a given profit contribution}} = \frac{2200 + 600}{1.26} = 2222 \text{ customers}
\]

If the maximum number of customers that can be served in a month is 2800 then the maximum net income can be calculated as follows:

\[
\frac{2200 + \text{max net income}}{1.26} = 2800 \\
2200 + \text{max. net income} = 3528 \\
\text{Maximum net income} = 3528 - 2200 = 1328
\]

FINANCIAL MANAGEMENT

PRACTICAL PROBLEMS IN COSTING SERVICES:

In any hotel the services offered must be assigned a cost. To cost a service, the organisation must gather all of its cost in the same way as a manufacturing organisation. However, some costs may be more difficult to determine than in a manufacturing organisation. Many service costs will be labor based with all the problems of overtime, holiday pay, bonuses etc. involved in such costs.

In addition, many service costs are fixed, rather than typical variable costs of materials and labor that are found in manufacturing organisations. These fixed costs need to be
apportioned to cost centres and absorbed into the service unit.

**COST UNITS FOR THE SERVICE INDUSTRIES**

A major problem in service industries is the selection of a suitable unit for measuring the service: in deciding what services are actually being provided and what measures of performance are most appropriate to the control of costs.

Examples of units:

<table>
<thead>
<tr>
<th>Service</th>
<th>Unit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant Meals</td>
<td>Meals</td>
</tr>
<tr>
<td>Hotel Services</td>
<td>Guest days</td>
</tr>
<tr>
<td>Transportation</td>
<td>Passenger-miles</td>
</tr>
</tbody>
</table>

Cost will be classified under appropriate headings for the particular service. This will involve the issue of suitable cost codes for the recording and collection of costs. For example, if the hotel has several vehicles the main cost classification may be based on the following activities:

1. Operating and running the vehicles (cars, trucks, etc.)
2. Repairs and maintenance
3. Fixed charges
4. Administration

Within each of these there would need to be a sub-classification of costs, each with its own code so that under fixed charges for example, there might be the following breakdown:

1. Licenses
2. Insurance
3. Depreciation

In costing services, it is often important to classify costs into their fixed and variable cost elements. Many service applications involve high fixed costs and the higher the number of cost units, the lower the fixed cost per unit. The variable cost per unit will indicate to management the additional cost involved in the provision of one extra unit of service.

**SETTING PRICES**

Setting prices for food and beverage services and accommodation is a fine art. Start by listing all the costs involved and add your required profit in order to determine selling prices.

This "bottom up" approach to pricing must be flexible to take into account fluctuation in demand, but the targets should be achievable over the year as a whole. You must of course always take account of the competition.

However some small properties are in the position of being able to set their own prices, based on the fact that they offer a unique product.

Look at sales mix also in setting prices. Do not try to achieve the same percentage of profit on all items. Items that move the most can go out at a smaller margin if necessary and vice versa.

**CONTROL PROCEDURES**

Safeguarding the assets of a small hotel is an important function for the owner/manager.
A good system will protect assets and provide useful information. Control systems must be seen to be carried out and must be monitored on a regular basis.

**Controlling Purchases**

Controlling purchases will involve setting up an efficient purchasing system where documentation is used and processed correctly.

Purchase orders should be matched to delivery notes and invoices and these should be matched to statements as necessary. Any discrepancies should be noted and followed up.

Once goods have been checked they should be recorded on a receiving report/goods received book, and entered on individual stock record cards (depending on the size of the business and nature of the goods).

Requisitional goods and monthly stock checks should be routinely carried out.

**Controlling cash and other receipts**

Controlling cash and other receipts with a good system will benefit the hotelier and his/her employees, as it will show that everyone is functioning honestly and responsibly.

In each cash handling area procedures need to be developed to ensure that all transactions are recorded and processed correctly. Ideally each point of sale will have a cash register, the balance of which can only be read by the manager/owner. This should be done at the end of each shift.

"No sales" recordings on the audit roll should be discouraged and followed up on.

All cash receipts should ideally be deposited daily in the bank.

**CASH DISBURSEMENTS**

Cash Disbursements must also be controlled. A petty cash can cover minor transactions. Where possible payment should be made by check and supported by an approved invoice.

Checks should be used in a numbered sequence and the person who prepares them should sign them.

Ideally two signatures should be required on checks.

**Bank reconciliations**

Bank reconciliation should be carried out monthly, when the end of the month statement is received. The following example shows how this may be done:

<table>
<thead>
<tr>
<th>Bank Statement</th>
<th>Outstanding checks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balance $3702</td>
<td>No. 3510 $2295</td>
</tr>
<tr>
<td>Your Balance $4081</td>
<td>Interest earned on</td>
</tr>
<tr>
<td>Deposits not yet</td>
<td>Bank deposits $61</td>
</tr>
<tr>
<td>recorded on</td>
<td>Bank charges $22</td>
</tr>
<tr>
<td>Statement $2900</td>
<td>The reconciliation</td>
</tr>
<tr>
<td>Outstanding checks</td>
<td>would be as follows:</td>
</tr>
<tr>
<td>No. 3507 $187</td>
<td></td>
</tr>
</tbody>
</table>
The steps involved in controlling labor costs will involve analyzing each job, creating job descriptions where these do not exist, or amending existing job descriptions as necessary.

From job descriptions each task must be analyzed so that set procedures can be developed and the time needed to complete each task can be established.

These steps enable staffing levels to be calculated:
- Number of rooms let
- Number of room assistants being responsible for how many rooms
- Then number of room assistants required on that particular day.

This same principle can be applied to cooks, dining room staff, bartender etc.

Labor cost should be closely monitored and actual cost should be measured against budgeted costs on a weekly basis.

Line managers and supervisors must be involved in controlling labor cost.

**Analysing Costs and Sales**

Managers/owners and senior staff must be able to analyse and then interpret the financial statements of their property. They need this financial information in order to plan ahead and to make rational decisions with relevant information.

Analysis and interpretation of financial statements involves looking at the various

---

**Controlling Food/Beverage Costs**

No matter how thorough your purchasing controls may be, your business will suffer if internal controls of food and beverage are inadequate.

Control of these costs will include the use of standard recipes for all menu items. This also includes cocktails in the bar. These recipes will specify the quantity of each order, the ingredients required to produce a specific quantity and quality of a particular food or beverage item. The preparation cooking method must also be included.

These standard recipes can then be costed and will provide information on total cost and cost per portion. Once the cost per portion is established, a selling price can be calculated.

Gross profit targets may be flexible depending on ingredient costs and the need to set a realistic selling price. However, the kitchen should be able to achieve its overall target, which should be checked on a regular basis.

**Labour Cost Control**

Labor costs can be more complex than any other form of control as they involve the measurement of productivity.

---

<table>
<thead>
<tr>
<th>BANK BALANCE</th>
<th>YOUR BALANCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>3702</td>
<td>4081</td>
</tr>
<tr>
<td>2900</td>
<td>61</td>
</tr>
<tr>
<td>(187)</td>
<td>(22)</td>
</tr>
<tr>
<td>(2295)</td>
<td>(187)</td>
</tr>
<tr>
<td>4120</td>
<td>4120</td>
</tr>
</tbody>
</table>
parts of these statements, relating them to each other and to the picture as a whole, in order to determine if any useful interpretations can be made. Ratio analysis should also be undertaken. Those managers without a financial background, should seek to ensure that their knowledge of financial statements will enable them to make rational business decisions, and they should not rely entirely upon external advice.

Analyzing Costs
Cost analysis should be an ongoing exercise and managers should not wait for end of the year accounts to discover that they have overspent. Refer to budgeted costs and previous cost information, which relates to a similar period in time.

Keep staff informed. See that they understand the need to control costs. Praise cost cutting initiatives and invite staff to make suggestions for cost cutting measures.

Analyzing Sales
Sales analysis for accommodation development is often the responsibility of front desk staff. Keep a careful track on occupancy statistics by room, person, average selling price per room etc. Compare your results with other hotels through your local hotel association. Food and beverage and other sales must also be analyzed. Involve your staff by discussing results and asking for ways to improve sales. Regular training can assist in this.

---

Statistical Analysis for Hotels
Financial statements present absolute numbers, thus the need for the compilation of statistics. Especially in business like hotels that offer different services, along with financial statements, statistics are important to managers in their decision making and control process.

Knowing the activities that take place within the hotel during the high and low tourist season, type of guests catered for, their spending habits etc, is important because these can be used by management for planning, controlling and decision making. For example knowing exactly how many staff will be needed, their work schedules etc.

The following are the most commonly used statistics for the small hotels:
1) Room Occupancy Percentage
2) Guest Occupancy Percentage
3) Double Occupancy Percentage
4) Average Rate
5) Revenue Utilization
6) Average Length Of Guest Stay

Room Occupancy Percentage
This statistic is used as an indication of the activity of the hotel. A comparison of past results with the current year is useful to make future assessment.

Formula

\[
\text{Room Occupancy Percentage} = \frac{\text{Number of hotel rooms occupied}}{\text{Number of rooms available in hotel}} \times 100
\]

The result is expressed as a percentage.

Guest Occupancy percentage
The use of this statistic is very similar to room occupancy percentage, the difference is that it is related to bed utilization.

Formula

\[
\text{Number of guests in hotel} \div \text{Total bed capacity}
\]

The result is expressed as a percentage.

**Double occupancy percentage**

Double occupancy percentage indicates the number of rooms taken up by 2 or more persons. This statistic is useful in measuring the sales of the Front Office and the Selling Department.

Formula

\[
\frac{\text{(Number of guests) - Number of rooms sold}}{\text{Total number of rooms sold}}
\]

The result is expressed as a percentage.

**Average Rate**

This statistic assesses the spending habits occurring within the hotel. This can be measured on a per guest basis, occupied room basis or on a room in hotel basis.

Formula

- **AVERAGE ROOM RATE OCCUPIED**
  
  \[
  \text{Room revenue} \div \text{Total number of rooms sold}
  \]

- **AVERAGE GUEST RATE**
  
  \[
  \text{Room revenue} \div \text{Number of guest in hotel}
  \]

- **AVERAGE ROOM RATE IN HOTEL**
  
  \[
  \text{Room revenue} \div \text{Number of rooms in hotel}
  \]

**Revenue Utilization**

This statistic is used to show revenues that are not yet recorded. It measures the Actual room revenue (that is, income from rooms rented) as a percentage of the Maximum revenue (that is, income from renting all rooms if they were let at maximum rates).

Formula

**Actual Room Revenue**

\[
\frac{\text{Actual Room Revenue}}{\text{Maximum possible revenue from available rooms}}
\]

The importance of this statistic is to make certain that optimum revenue is made from the letting of rooms.

**Average length of Guest Stay**

This statistic is concerned on the weighted average of "night stay" by guests and helps in forecasting reservations.

<table>
<thead>
<tr>
<th>Class of Guest</th>
<th>length of stay</th>
<th>No. of guests</th>
<th>weighted product</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>1 Nights</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>B</td>
<td>2 Nights</td>
<td>35</td>
<td>70</td>
</tr>
<tr>
<td>C</td>
<td>3 Nights</td>
<td>25</td>
<td>75</td>
</tr>
<tr>
<td>D</td>
<td>4 Nights</td>
<td>15</td>
<td>60</td>
</tr>
<tr>
<td>E</td>
<td>5 Nights</td>
<td>13</td>
<td>65</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>108</td>
<td>290</td>
</tr>
</tbody>
</table>

**Average length of Guest Stay**

Simple Average \(15/5 = 3\) Nights

Weighted Average \(290/108 = 2.7\) Nights

**Activity ratios**

Activity ratios measure the effective utilization of resources of a business by management. It also helps in effectively measuring the control of the amount invested in certain assets. In the Hospitality Industry the following activity ratios are used:

1. Inventory Turnover Ratio
2. Inventory Turnover Period
Inventory Turnover Ratio
This ratio expresses the number of times inventory has turned over during the year.
Formula
\[
\text{Cost of Sales} \div \text{Average Inventory}
\]
Average Turnover = (Opening Inventory + Closing Inventory)/2

Inventory Turnover Period
This ratio expresses the number of days inventory is on hand.
Formula
\[
\frac{365}{\text{Inventory Turnover Ratio}}
\]

BUDGETING
Budgeting is planning for the future. We do not live our lives from day to day without any considerations about the future. We plan from major things such as our career to small things such as what we are going to do tomorrow or over the weekend. The first is a long-term plan; the second is a short-term plan. The same is true of business, however, here the plan is expressed in financial terms and is more formal and deliberate. This process is known as budgeting.

A budget is part of the planning process. Setting budgets for capital expenditure, operating expenses, costs and sales in each department can provide a sound basis for running your business. Budgets can clearly set down management policy, and provide control by comparing actual results with plans, and highlighting areas where corrective action may be required.

You can use historical accounting information when setting budgets, together with information on predicted trends. If however your business is a new one, then you must rely merely on educated estimating and the assistance of other small hoteliers on your island or in the region.

This budgeting process is an important part of an accounting and management system for businesses. The budget is prepared by management and subsequently reviewed, revised and approved by directors of the organisation. The official budget sets specific goals for the fiscal period and through appropriate ways designates the manner in which the revenues of each fund are to be used to accomplish these goals.

Functions of the Budget
1. Planning: Forward planning compels managers to formally consider alternative courses of action; evaluate them properly and decide on the best alternatives. It also encourages managers to anticipate problems before they arise giving them time to consider alternative ways of overcoming them when they do arrive. Such an exercise tends to produce better results than decisions made in haste.
2. **Co-ordination**: Without planning, department managers may make decisions about the future, which are incompatible or even in conflict with other departments. For example, sales may be planning to extend the credit period in order to stimulate sales to a point beyond the bank overdraft agreements. Budgeting helps to avoid such conflicts by encouraging managers to consider how their plans affect other departments and how plans of other departments affect them.

3. **Control and performance Evaluation**: While budget preparation aids the planning process, the way budgets are used helps in control and performance evaluation. The system of calculating deviations from budget i.e. variance, after the event fosters cost consciousness amongst workers and managers and highlights areas of over, but more importantly, under achievement.

4. **Participation**: By actively involving a manager at all steps of the chain of command, the process of budgeting brings the different levels closer together. All members feel that they have a say in the running of the organisation, which leads to increased job satisfaction and consequently productivity. Through this process staff generally at all levels become more cost conscious and prudent.

**The Use of Budgets**

As used by business enterprises, a budget is a detailed estimate in numerical terms of the scale of operations in some phase of activity in some future period. Budgets are always forecast of future activity, as contrast with statements of manufacturing costs, income statements, and other similar statements that are reports upon what has happened in the past. Budgets are detailed. All anticipated transactions within the area of business activity surveyed must be separately accounted for, and as a rule, the volume of each kind of transaction for each month or for some other series of short periods within the longer forecast period must be separately estimated. Budgets are prepared in numerical terms, although not necessarily in terms of dollars and cents.

The usefulness of the budget in the process of making and coordinating plans is key. The budget is also useful as a communication device and as a standard with which to compare actual performance.

**The Budget as a Communication Tool**

Management plans will not be carried out (except by accident) unless the organisation understands what the plans are. Adequate understanding includes not only knowledge of programs and objectives, but also knowledge about policies and restrictions to which the organisation is expected to adhere. Examples of these kind of information including: the maximum amounts that may be spent for such items as advertising, maintenance, administrative costs and the likely wage rates and hours of work, desired quality levels and so on. A most useful device for communicating quantitative information concerning these objectives and limitations is the approved budget.
THE COMMITMENT CONCEPT

When the budget is prepared in accordance with the procedures outlined above, the final document may be regarded as a sort of contract on two-way commitment between management and the operating supervisor. By agreeing to the budget estimates, the supervisor in effect says to management "I can and will operate my department in accordance with the plan described in the budget". By approving the budget estimates, management in effect says to supervisors: "if you operate your department in accordance with this plan, you will do what we consider to be a good job." Both of these statements include the implicit qualification of "Adjusted for Changes in Circumstances" since both parties recognise that actual events, (such as price levels and general business conditions), may not correspond to those assured when the budget was prepared and that these changes will, inevitably, affect the plans set forth in the budget. In judging whether the commitment is in fact being carried out as the year progresses, management must consider these changes.

BUDGET CYCLE

1. Establish realistic goals: In preparing the budget, present factors must be taken into account. Opportunities or threats must be considered and should be reflected in the budget.

2. Create a plan to achieve these goals: This should start at the departmental level where the head and staff define what is required to meet these goals. Depending on the establishment, the marketing department works closely with the departments.

3. Compare the results: When comparing results you ask questions and examine the differences. If the outcome has exceeded or are below expectations, you need to be able to define the circumstances. Variances do not offer a solution only identifies the area of differences.

4. If necessary, take corrective action: The differences between the budget and the actual could be circumstances that none could foresee; for example, Hurricanes, fires, rapid decline in the economy, and the September 11, 2001 tragedy. In addition, a major factor could be that the competition was overlooked. However, flexibility of budgets allows for adjustments so that evaluation could be accomplished. There could also be differences that were due to increased sales that should also be analyzed to assist in future planning.

5. Improve budgeting process: Employees, especially those who assist in the process need to be aware that there is a constant need to improve the process. By improving the budgeting process, the efficiency of the business is increased as improved management decisions are made.

Protecting and Controlling the Cash Resources

Cash management entails good management of all the working capital items in the business. It is very important for planning, controlling and especially for decision
making purposes. Control procedures for cash receipts, cash disbursements and certain departments, such as payroll, food and beverage and rooms are of utmost importance as they aid in controlling the cash resources available in the business for maximum income generation.

**Cash Management**
Cash management entails good management of cash, accounts receivable, inventories and accounts payable. In managing these working capital items, one has to make certain that those supplying goods to the business on credit are paid. If this is not done there is a possibility of losing credit facilities, losing suppliers and most importantly of gaining a reputation of poor credit rating in trading.

Moreover, the collection of debts from customers must be made on time to avoid a cash shortage or lower net profit, as a percentage of these may become bad debts. In addition, the management of stock is very important since too much money invested in stock is idle money that is not generating profits. Too much inventory could also result in costly storage, deterioration, evaporation, etc of stock or the possibility of stock becoming obsolete and paying unnecessary overdraft interest. On the other hand low inventory may lead to failure in meeting orders as the business may be running out of stock and may lose the opportunity of taking advantage of discounts on bulk orders.

**Cash on Hand**
The amount of cash held in the business is very important but it is also risky. It is advised that only a small amount of cash be held in the business for circulation or for petty cash. The cash on hand should be enough for the normal day-to-day running of the business. At the end of a shift or day, monies should be accounted for and deposited at the bank, to gain interest or reinvested to increase income.

**Cash at Bank**
This is cash held at the bank in a current account. The amount of cash in this account should be sufficient to pay payroll and other current bills. Any excess money at the bank can also be invested elsewhere to generate more revenue. In any type of business a surplus or deficit of cash may occur at any time. This is even true and more common in the Hospitality Industry because of the seasonal characteristic of the Industry.

**A Final Word**
So much of what has been discussed in this chapter can be done much more efficiently and effectively by computers than by manual systems.

There are some excellent packages available; including those developed exclusively for small properties. Introducing computer technology where it does not presently exist can be daunting, but, once mastered, a decision of this nature will never be regretted!

Some forms, which you may find useful, are to be found in the appendix.
The following references may also be helpful:

- Hospitality Management by Michael M Coltman
- Accounting (3rd Edition) by Van Nostrand Reinhold 1987
- Hospitality Industry Managerial Accounting, by R. S Schmidgall; 5th Edition Educational Institute AHMA
- Hotel Internal Control Guide, by Internal Audit Committee of AHMA 1997
- Accounting for Hospitality Managers, Raymond Cote AHMA 4th Edition 2001
CHAPTER SEVEN
MARKETING YOUR PRODUCT
WHAT IS MARKETING?
Finding, reaching and developing markets for the small hotel is a challenging task. It is made possible through the magic-and-mystery term called “marketing”. But before we start debating about right and wrong ways of marketing, let’s define just what it is. According to the Chartered Institute of Marketing:

Marketing is the management function which organises and directs all those business activities involved in assessing customer needs and converting customer purchasing power into demand for a specific product or service, and in moving the product or service to the final consumer so as to achieve the profit target or other objective set by the company.

In other words, marketing is everything that is done to bring the product to the market (the buyers) to persuade them to buy it. For the small hotel, the opposite is true. A hotel is faced with the dilemma of bringing the market (the visitor) to the product.

MARKET POSITIONING
Market positioning is the ability to match your product and service with the expectations of a particular market segment. If the needs of these market segments are adequately and consistently satisfied, then the result is a higher level of repeat business. On the other hand, without effective positioning there is a risk of targeting incompatible market segments while not being acceptable to a sufficiently high volume of any. In developing an effective positioning strategy, the following questions should be considered:
- What specific markets are available?
- What are the expectations of these prospective target markets?
- What is the marketing mix required to effectively penetrate these markets?
- What are the strengths and limitations of competing hotels which target these same market segments?

Once you have identified the particular market segment you wish to target, then you need to gear your property to satisfy the needs of that segment, as well as direct your marketing efforts toward it.

If, for instance, your property has had a historical appeal for honeymoon couples, you may want to take steps in terms of decor, in-hotel programs and packaging to broaden your appeal to this market. You might promote and/or advertise almost entirely in this area. One advantage of a small hotel is that highly successful business can be built on a single market segment.

There are many successful examples of such specialization throughout the Caribbean. Examples of these include dive, birdwatching, hiking, clubs and associations, sports, musical concerts, etc. Specialization is a well-established trend in business today, and the “small hotel” is ideally suited to serve a special interest market.
ASSESSING YOUR PRODUCT

Logically, the place to begin marketing a small hotel is with the product itself. Nothing is more important. The best marketing, the best sales programs and the cleverest advertising are all ultimately doomed to fail if the product does not win the consumer’s approval. A good definition of a hotel’s product is everything that happens to a guest from the time of arrival to the time of departure. Admittedly, this is a broad definition. But remember, your product is for the most part an intangible thing called a “vacation experience.” The first question a small hotelier should ask himself/herself is: “What kind of a product do I have?”

In analyzing what kind of a product you have, try to list a wide range of guest experiences, i.e. - all the things guests may be looking for - since the sum of these is your product. And unlike the worker on the automobile line, yours is a product that is the result of your total effort, resourcefulness and skill as a small hotel operator.

Itemize your physical assets:
- Location,
- Physical appearance
- Food
- Entertainment
- Sports facilities
- Staff skills

Determine your position in relation to your competition. Measure your vacation assets and liabilities against theirs. Measure your unique selling points against theirs. Keep in mind the price you charge for what you offer, and match your marketing successes against theirs. You have another priceless resource, not only for measuring your product, but also for providing clues to the market it attracts.

PRICING

Pricing is defined as the general approach to be used in setting individual prices for your hotel’s products and services.

Traditional Strategy

In determining the pricing, the following areas should to be considered:

1. **Fixed (One-Price) Method** - This method offers the same goods for purchase to all, at the same price. The advantages to this method are that it eliminates customer favoritism through equal treatment to all customers and facilitates quick handling of transactions.

2. **Price Levels** - The goods and services offered are classified into low, medium or high (luxury) categories. The type of goods and competitive conditions should be used in making that determination.

3. **Specific Strategies** - In deciding on the pricing strategy related to product pricing, you can consider strategies based upon demand, cost and competitive factors.

Criteria in each of these include:

a) **Demand** - Price decision strategies based on the impact on volume created as a result of the price. Usually, this means the lower the price,
the greater the demand, and vice versa.

b) **Cost** - The cost to produce plus a reasonable profit markup. Although the easiest of the strategy methods to calculate, caution must be exercised if the impact of demand is not considered.

c) **Competition** - Pricing is based on the analysis and evaluation of other hotels which are producing the same type of goods and services. This strategy will result in pricing which is either below, equal to or greater than competition. Arriving at this particular approach means careful consideration of elements such as "self-service" (which often enables a lower price to be offered) or reputation, which can justify a higher price level for what is essentially the same product or service offered.

**DISCRETIONAL**

In addition to the pricing strategies listed above, the following approach can be utilised.

**Flexible Pricing** – Instead of the "Fixed (One-Price) Policy described above, a flexible pricing policy may be followed. Under this method, different prices may be offered to different customers for similar goods or services bought. This is particularly applicable when your hotel finds itself in situations where purchasing is being conducted on a "negotiated", rather than straight bid or rate sheet basis.

Your hotel pricing strategy can include the use of estimating techniques as well as historic cost data taken from hotel records.

Pricing strategy also requires coordination with other departments and operations of the hotel, including consideration of cash flow, return on investment and profit objectives. In addition, other considerations will apply when you transact business outside the country. These include strategies connected with tariffs, quotas and protection against fluctuations in exchange rates.

You can also consider special pricing situations involving reciprocity when the customer is one from whom you often purchase goods or services.

In developing overall hotel pricing strategies, these questions must be addressed.

1. What is the customers' perceived value of our product compared with:
   - Price
   - Competitive products and prices
   - Substitute products and prices
   - The alternative of not buying at all?

2. What features/benefits should be included at no extra charge:
   - Amenities?
   - Services?

3. Which forms of payment are acceptable?

4. What promotion, discount, rebate, or other special incentives are offered? Will the promotion offer have a time constraint to incite the customer action?

5. What quantity discounts, if any, will be offered to guests?

6. Should there be specific time schedule of price changes?

- How quickly are your hotel's costs changing?
Are competitors changing prices?
Are there production or raw material shortages (or excesses) that may induce a price change?

It is important to ensure that all brochures and rate sheets are accurate and up-to-date. Such data should be periodically reviewed (at least once every 6 months) and revised as may be appropriate. All revisions should be marked with a sequential revision code number as well as any other notation which will prevent customer confusion or misunderstandings.

In order to prevent legal problems, all such published data should contain a notation which allows you the unilateral right to revise or withdraw the price of any item or service.

**SPECIALITY (NICHE) MARKETING**

Developing a marketing strategy with a limited advertising budget means you had better be certain your advertising is reaching your best possible markets. With limited dollars, it would be foolish to undertake a worldwide marketing scheme. For example, if you determine that the U.S. is your best market, you may want to ask yourself, “How well known in Rhode Island is my hotel?” If the answer is not very well, you might decide that even if European, Japanese and South American markets are potentially good, you can’t afford to dilute your limited advertising budget.

You should also determine what off-season market has the most potential and how your hotel can appeal to, and enter that market.

**HONEYMOON MARKETING**

Most Caribbean hotels could and should qualify as great “Honeymoon Hotels.” Some might need to add features and attractions with honeymooners in mind. Change your pricing philosophy to include off-the-property features such as sailing, scuba lessons, tours and car rentals. You need not be a totally inclusive resort to offer inclusive features. With a lower room rate to start, you can pack in great excitement and value which, along with your king-size bed, will sound like the ideal place for honeymooners.

If you are serious about the honeymoon business, make a commitment to it. Make your staff aware that honeymooners are especially important. Think and act like a Honeymoon Hotel. Consumers and travel agents will take you seriously, and remember, a package is meant to be used. It isn’t a marketing phenomenon designed to “lure” guests to your hotel. Be dedicated to delivering all of the package components to enhance the overall vacation experience, and send the guests home loving your hotel and destination.

**AIRLINES SERVING THE CARIBBEAN**

The scheduled airlines that serve the Caribbean are a lifeline. Without them a viable economy might not survive. How well we work together and understand the related functions that bind the airlines and the hotel industry together will be the measure of our ultimate success.
THE COMMUNICATIONS FLOW
This communication flow may be accomplished through local hotel associations and by direct contact between individual properties and the carriers serving their regions. Independent hotels in particular, should make sure that all carriers are aware of their mainland hotel representative, and that reference material on your property is supplied on a regular basis. Hotels should write to the head office of every airline to determine the department and location.

AIRLINE SCHEDULING
Many hoteliers, particularly on smaller islands which do not receive direct trunk line service from major markets, are frustrated by the airline scheduling process. In many ways it is the airlines’ most difficult task since the primary objectives for good scheduling all too often conflict. Connecting traffic flow must be considered at both origin and destination, and the stage length (flying time) of most flights to the Caribbean from major markets in North America makes it impossible to satisfy everyone. Schedules from the northeastern US and Canadian coastal gateway cities, for instance will be geared to connecting service from interior points.

DISTRIBUTION CHANNELS
DIRECT MARKETING
If you are an established hotel, you have registration cards from previous guests. They should receive your new brochure and a letter inviting them to return and visit you again. Your personal mailing list can include friends, government and business people. Happy guests can be your best sales people. Ask them to take a small supply (three or four) of your brochures and rate sheets along when they leave. No one who visits your hotel should leave without a brochure and rate sheet. Make sure you always have a brochure and current rate sheet in each room.

TOURISM BOARD OFFICES
Both locally and abroad, these offices should always have an ample supply of your brochures and rate sheets. Write them occasionally and ask them to check their stock. Also, ask to be kept informed of joint advertising campaigns, trade promotions and FAM trips.

HOTEL REPRESENTATIVES
A hotel representative provides a convenient way to book rooms and quote space availability and provide information to potential guests, travel agents and wholesalers, and to collect deposits and prepayments. Some hotel representatives confine their representation to one hotel or non-competitive hotels in each island/country. However, there has been a change in thinking regarding this. By representing a number of hotels in a given destination, a representative is better able to service the island/country by providing airline tour desks and wholesalers with a substantial room inventory. In return, the representative
gains a certain degree of competitive advantage for the area’s hoteliers. Reps with a number of properties in a given island/country are also in a position to keep business in an island/country by offering alternative accommodations in the event of sell-outs and overbooking situations. This also provides travel agents, wholesalers and potential guests with the priceless commodity of “one-call” convenience. If you have retained or plan to retain a hotel representative make sure he/she has an ample supply of brochures and rate sheets.

In selecting the hotel representative who can best market your property, one of the best yardsticks to use is simply to check with some of the rep’s current hotel clients to get a clear picture of his/her performance. In addition, it is important that he/she meets the following criteria:

- Has a large enough client base to exert leverage in the marketplace with travel agents, wholesalers and airlines
- Has been in business long enough to have a measurable track record
- Has a good working relationship with the major airlines and wholesalers/tour operators doing business in your island/country
- Has a strong financial position (an important issue if the rep will be handling deposits and prepayments for the hotel).
- Has both local and toll-free telephone lines to service an entire island/country.
- Has an affiliation with one or more airline reservations system, enabling travel agents to book hotel rooms by simply using their in-office “computer reservation system” (CRS).
- Has a well-informed and knowledgeable reservations staff.

Your representative will provide exactly what you pay for and no more. Make sure you understand EXACTLY what your representative will provide for the amount you pay.

Fees for a hotel representative will vary depending on the type of representation (does it include on-line travel industry computer system reservations etc.), or the number of hours per day the reservation lines are open to receive calls (which may vary from 8 to 12 to 24 hours per day). Some representatives will charge a straight retainer fee plus expenses, while others will charge per room per month plus a percentage of each booking.

While many hotel representatives do provide selling and marketing services, at additional costs above and beyond their representation fee, your own efforts are needed in areas such as advertising, trade promotions, FAM trips and agent relations.

**Retail Travel Agents**

Retail travel agents frequently belong to trade organisation such as the American Society of Travel Agents ASTA and/or the American Society of Retail Travel Agents, which deal with airlines, cruise lines, steamship companies, car rental firms, hotel representatives and wholesale tour operators. Having made the selection of the hotel with
Their clients, they book through various methods available to them including:
- Their computer reservations system CRS, - the most popular way of booking nowadays.
- A representative of the hotel
- A wholesale tour operator, if a tour package is bought.
- By fax to the hotel directly
- Through an airline that may offer the booking of hotel rooms as an ancillary service. This method, however, is much more frequently used in connection with commercial hotels for business travelers, and is much less desirable for vacation travel to resort hotels

When calling on a travel agent, remember that he or she is one of your most important sales representatives. He or she can sell his/her client on staying at your hotel. There are many qualified mail houses that can advise you on mailing to select travel agents. Your professional brochure company can also be helpful. If you decide to make personal calls on travel agents always leave a packet of five to ten brochures with them.

Many tourist boards organize “FAM” trips for travel agents. When these agents visit your island/country, make sure they have your brochure and rate sheet whether they visit your property or not. We suggest one. If they want more, mail them to their agency with a personal letter. In this way you will be sure they get to the agency and are not left behind.

WHOLESALE TOUR OPERATORS
Tour wholesalers are specialists who promote their product on the basis of all available facilities in a given destination, offering the widest possible range of properties, sight-seeing features, transfers and special interest requirements. Their packages are published in conjunction with airlines serving the area. These packages are sold to the consumer by the wholesale tour operators through retail travel agents and airline tour desks. Since neither retail travel agents nor airline tour desk employees can possibly be familiar with every area in the world expertly, they must turn to specialists. By using the experts to book their arrangements with greater speed and efficiency they not only serve their clients better but consummate the sale faster and move on to the next one.

If you wish to participate in a package program with a wholesaler, contact the wholesaler and he/she will tell you his/her requirements. UK & European tour operators virtually control all leisure travel in their countries (where by the way, people are entitled to and take much longer vacations then Americans do). Even small hotels should consider spending the money to take part in events such as the World Travel Market in London, etc at least once to get exposure.

Specialised packages such as golf tours, tennis tours, scuba diving tours, honeymoon packages, family vacations, gourmet specials etc. are made available along with the more conventional packages based on rack rates.
The override commission paid to wholesale tour operators is remuneration for their expenses such as office expenses and documentation. Check carefully what is included and what is extra.

Small hotels in particular, should watch out for the following pitfalls when dealing with tour operators. Beware the carpet-bagger who promises the earth. It sounds great that he/she is going to fill all your beds year-round, but what happens when/if:

- The operator goes broke?
- Fails to deliver in the summer?
- Fills your hotel for a year or maybe two, but then enlarges his/her business and needs a bigger hotel?

You should call on the wholesale tour operator and bring his/her personnel up-to-date on any changes or additions you have made to your property since their last inspection. A wholesale tour operator prints and distributes his/her own brochure when making promotional calls in a given area. These brochures are usually prepared twice a year and reflect the seasonality of the destination in both rate structure and services available.

MANAGING BOOKINGS

GROUP BOOKINGS

If you do want group business, make sure you select the type of group that your hotel can handle and make happy. Retail travel agents have access to groups, especially those agents who work with conventions. Pre-convention and post-convention groups may be attracted to the small hotel, likewise sports clubs and social organisations. Handling mass check-ins and check-outs can be difficult when the hotel has a small staff and some small hotel may not want group business. Some of the other problems that arise through group bookings include:

- Blocking the entire hotel with a group may necessitate turning away regular or return guests.
- It is usually very difficult to fill the hotel the day preceding a group’s arrival and the day after they leave.
- Group bookings tend to lower your income per room as groups usually demand a price break.

OVERBOOKING LIABILITY

Nothing destroys the credibility of retail travel agents, wholesalers and hoteliers more than overbooked hotels. When this occurs, it is most damaging. It is also legally very hazardous, particularly in this age of consumerism, since consumer protection agencies enforce the laws rigidly and usually in favour of the consumer. Any hotel doing business in the United States is liable, regardless of its location. Responsibility clauses notwithstanding, anyone engaged in the sale of a hotel room that ultimately is overbooked can be taken to court. The statutes provide the fullest protection to the consumer and many more lawsuits are being filed.
DEVELOPING A MARKETING COMMUNICATIONS PROGRAM

It is impossible to cover here all the directions that the marketing communications program for a small hotel could take. Each hotel and its market differ, and resources available are not the same for all properties. However, a well thought out creative program that effectively communicates your message to the market can greatly increase the power of your dollar investment. Whatever methods you use and where you use them should be decided on the basis of your marketing plan. These should be evaluated regularly to make sure they are paying off.

ESTABLISHING A BUDGET

In attempting to reach any market, you must establish a strict spending philosophy and stick to it. A useful guide is the annual study conducted by Horwath & Horwath, a firm that gathers worldwide operating statistics on the hotel industry. The following is a good budget guide for the average small hotel:

<table>
<thead>
<tr>
<th>Year</th>
<th>Planned Sales</th>
<th>Advertising</th>
</tr>
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<tbody>
<tr>
<td>1st</td>
<td>$100,000</td>
<td>10% or $10,000</td>
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<tr>
<td>2nd</td>
<td>$130,000</td>
<td>8% or $10,400</td>
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<tr>
<td>3rd</td>
<td>$155,000</td>
<td>7% or $10,850</td>
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<tr>
<td>4th</td>
<td>$200,000</td>
<td>6% or $12,000</td>
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<tr>
<td>5th</td>
<td>$250,000</td>
<td>5% or $12,500</td>
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When repeat business has been well established and good word-of-mouth advertising becomes constant, advertising budgets can be reduced to between 4% and 5% of sales for advertising.

USING A PROFESSIONAL AGENCY

There are many professional companies that will work with you and guide you in both your advertising and public relations programs. Some firms offer both services, but increasingly they are handled separately because they are very different functions. Public relations firms try to get your hotel mentioned in the media without direct cost to you. They will send information on your hotel to travel writers and broadcasters with invitations to visit in person and will arrange a variety of promotions described below. Public relations agencies generally charge a monthly fee, plus out of pocket expenses for such items as telephone, postage and reproducing press releases and photographs. These techniques work together to reinforce each other, especially if they are coordinated properly.

If you cannot afford a public relations agency overseas, it is vital to work with the agency used by your tourist board and/or hotel association. Simply put, if you provide photographs and information, your tourist board or hotel association agency will distribute them. Travel writers and broadcasters who visit your island will be sent to visit your hotel.

If an agency should present you with an advertising proposal, don’t buy it simply because you like it. Equally important is whether the creative concept stands up to a simple set of criteria:
● Does it “position” your property?
● Does it clearly illuminate the kind of hotel you have and its basic nature?
● Does the creative concept speak to your target market?
● Imagine yourself making a sale in person - is this you and your property?
● Is the creative concept unique?
● Is it different?
● Does it break the boredom barrier so common to small hotel advertising?
● Does it set you apart from your competition?
● Is the creative concept flexible?

WORD-OF-MOUTH ADVERTISING

There is one vital and highly efficient means of communication that every hotel can utilize. It is very inexpensive, very effective, far too often overlooked and grossly underrated. It is very rarely exploited to its full potential. It is called word-of-mouth advertising, and it is critical to the success of any product.

HOW CAN A SMALL HOTEL MAXIMIZE THE VALUE OF WORD-OF-MOUTH ADVERTISING?

Naturally, by delivering a great vacation experience. But this alone will not foster additional business, since people take it for granted that they will get good service, good food and good accommodation. If they don’t you’ll get bad word-of-mouth advertising, which can be a powerful negative factor. The small hotel has a unique advantage in building a word-of-mouth reputation - primarily as a result of the intimacy between guest and management. As a small hotelier you have far more opportunities per guest to establish good word-of-mouth than your colleagues in a big property. Here are some specific suggestions for communication possibilities, many of which you may already be using. Divide the opportunities into two categories:

PRE VACATION (Before they arrive)

● Once a reservation is made, send a personal advance welcome, enclosing perhaps some helpful literature. Sign it yourself!
● Avoid mass direct mail to consumers - it is expensive, and more and more people are throwing such pieces away unread.
● A postage stamp instead of franking will stand out, and may be appreciated by a collector.
● Use this communication to make special offers: a discounted rate for additional persons, extra nights at a lower price, or a special off season bargain to previous visitors.

DURING VACATION (While they’re there!)

● This is the prime opportunity to establish good word-of-mouth. The possibilities are endless, and you’re the
best judge of which you can best pursue. But the object is simple; to give guests, in one way or another, more than they expect and are paying for. The key is personalized attention.

- Make sure that you meet every guest personally and that they know when and where you can be reached. Establish yourself as a resource - someone they can ask for advice, who is there if they should need help.

- Discover through conversation if they have any special interests you can help them satisfy; a meeting with local residents or a hobby they’d like to pursue. Offer suggestions.

- Consider an inexpensive parting gift; perhaps an island product, or a framed picture of them on vacation. Whatever it is, make sure your hotel is identified by name somewhere on the gift. Individualize as much as possible; the conscious expenditure of the time and money on a guest is the surest way to build business and generate enthusiastic reports.

- Say Good-bye in person!

**COLLATERAL BROCHURES**

Your brochure should be your most important piece of advertising, since all your promotional efforts will be tied directly to it. It should be your goal to get your brochure into the hands of the consumer, travel agent or meeting planner - the people who will book hotel rooms from you, either directly or indirectly. It will tell the story of your hotel when you are not there to tell it yourself.

We strongly recommend that you contact one of the many companies that specialise in photography, design, copy and total production of brochures. We caution you - don’t do it yourself or use well-meaning friends!

- Your brochure should be bright and colorful (4 colour process).
- It should be designed to cover the markets you want to reach and tell the true story of your property.
- It should not mislead your prospective guest.
- It should show your finest features and highlight anything that is unique, such as antique furnishing, special architecture, or what have you!

Your brochure should be a standard size and fold to get into a “number ten” envelope. This size (approximately 4”x9”) will also fit into all standard travel agent brochure racks. Other sizes create mailing, storage and display problems. The name of your island/country should be across the extreme top or top right-hand corner. Your hotel name should be within the top two inches in
a type-face that is easy to read. This information i.e. island/country name and hotel name, should be on both the front and the back covers so that if the brochure is placed in a rack backward, you still have the identity showing. It doesn’t cost any more to have this done.

Your hotel name should be easy to read so your hotel can easily be identified when your brochure is placed in a rack with many others. If your hotel name is bold, bright and clear. It will be readily seen. If you plan to distribute your brochures through travel agents, you should allow for a “travel agents block.” This is a white space approximately 1 1/2” high across the bottom of the back cover. The travel agent will then stamp his/her name in this area for identification. If you do not leave the travel agent block, they will then stamp over your cover picture, which detracts from your presentation, or they will not use your brochure at all.

RATE SHEET
Use a rate sheet to publish your current rates. Some hotels publish rate sheets seasonally; others publish them yearly, including both summer and winter. Rate sheets are inexpensive and should not be printed in larger quantity than you will use in one season or year. Most rate sheets are printed in one colour on tinted stock. Your rate sheet should always be slightly smaller than your brochure so it can be inserted in it. The design should have the same family image, to be compatible with your brochure. You should never give, mail or otherwise distribute a brochure without a rate sheet. Other information can be included on your rate sheet, such as:
- Your Reservations Number
- What to bring/what to wear
- Check-out times
- Special house rules/tipping policy
- Distance from airport
- Taxi fares, air service/boat schedules
- Government tax/Departure tax
- Cancellation policy
- Hotel representative (if applicable)

THE INTERNET
Today, the Internet is probably the most powerful (and cost effective) marketing tool available to small hotels. For most small properties the web is far and away the most effective marketing medium. Effective positioning on search engines to get maximum exposure.

WEBSITE
The most obvious way to market your property online is to create your own web site. Today there are a number of applications that can help you create what is called your “home page.” If you are unfamiliar with creating graphics on your computer, consider hiring a local company to build your web site.

Regardless of who creates your web site, you will need to choose a “hosting company” that will store your site on a computer to ensure that it is always available. It’s more important to choose a hosting company located near your customers than one near
you. Hosting prices have come down in the last few years and most hotels should be able to have their web site hosted for less than $30 per month.

**Factors of A Successful Website**

- Aesthetics of a site are important, graphics play an important part in making a site interesting. Overuse of graphics should be minimised as all the noise may drown out the actual message being communicated, not to mention the download times being slower making for user irritation.
- Functionality of the site on various browsers, e.g. what is viewed on Netscape does not necessarily look the same on Internet Explorer... also the various versions of browsers have different capabilities.
- Ease of navigation with easy to understand buttons and image maps.
- The site has to be accessible to your target audience, this will mean registering the site with various search engines, with a list of relevant syntax that people looking for your site would use e.g. "small hotel", "inn", "guesthouse", etc.
- Pay to advertise on popular sites and make your presence known, have reciprocal links with other relevant sites. Advertise on Tourism News groups.
- Make sure that links on your site are valid.
- Content of site should be relevant and interesting.
- The site should be regularly updated to keep it fresh and appealing with the latest information and prices. A number of ways of enticing return visits can be used such as using competitions and prizes, new articles, jokes/gimmicks and a myriad of destination links and articles.
- Should have elements of interactivity, let the people be in control of their itineraries. Create a site that will allow clients to have choice about planning their holidays.

It should be noted though, that many reservation systems (CRS's) cannot be interfaced by the net, therefore do not expect your site to become an automated one-stop shop destination.

**ONLINE ADVERTISING**
The introduction of the Internet has changed marketing and advertising like no other medium. Unlike traditional forms of advertising, the worldwide web can offer a faster and more cost-effective means to reach your target audience and measure the results. Advertising on the Internet is called, “online advertising.”

**EMAIL**
The Internet has introduced email (electronic mail), which allows people to communicate worldwide almost instantly. Using email your customers can send you a message from anywhere in the world, anytime of the day.

While the convenience and affordability of this communication tool is invaluable, email
also creates a few additional responsibilities. Since most of the world now has the ability to send you a message without delay, they expect a timely reply. To use email as a communications tool you must make it a habit to regularly check you email and respond quickly. Taking two days to reply to a message might cost you a sale.

Lastly, make sure that all of your messages include your electronic signature, which contains your full name, property name, phone, fax and email. You should never assume people sending you messages will recognise your reply without this information. Plus, you can never make it too easy for someone to contact you!

**BANNER ADVERTISING**

The online equivalent to print advertising is a banner ad. Banners are advertisements you place on web sites that link to your own web site. The big difference between online advertising and traditional advertising is that online ads are simple to change and easily measured. Within a matter of days after placing a banner ad (verses months for print), online publishers can supply you with statistics informing you how many times your ad has been displayed and how many times people clicked on your banner ad to access your web site. You don’t get that kind of feedback from a print ad.

**NEWSLETTERS**

Sending electronic newsletters via email is an inexpensive way for you to keep in touch with past guests and interested prospects. You must use this option wisely, as it can adversely effect your image if done incorrectly.

Unsolicited email is called “junk mail” or “spam”. You do not want to send people email if they do not want it. The alternative is called “opt-in mailing lists”. For example, on your registration card you might collect your customers’ email addresses, but that does not give you the right to add them to your mailing list for your newsletter. You should have a question asking if they would like to be added to your newsletter and a box where they can check the response, “yes” or “no”. Additionally, if you collect email addresses from your web site, it is now common to have a “double confirmation”. This process will keep people form signing up others without their knowledge or consent. Lastly, each correspondence should have removal instructions at the bottom of the message. This all sounds rather intimidating, however, there are services that will help you manage this process, including the sending of your newsletters. One reasonably priced service is called Tropica Email Publisher (http://www.email-publisher.com).

**MESSAGE FORUMS**

There are a number of web sites that offer message forums for readers interested in Caribbean travel. Being an active member of a forum’s community provides an excellent source for potential business.
Spend some time finding the message forums pertaining to your location and if necessary, even register to participate. By providing valuable information people will quickly brand you as an expert and will ask you for additional advice. Be cautious in this approach, as many forums do not allow commercial postings. It’s not a good idea to endorse your property, but there’s nothing wrong with placing your property name below your signature. Not only will people appreciate your knowledgeable information, they will respect that you are taking the time to help people with your island and not just to sell them on your property. You will build respect and business.

Auctions
There are a number of web sites that run online auctions. Most auctions allow for you to set a reserve price, which ensures that you receive a minimum dollar amount before accepting a winning bid. But the true benefit of an auction is not the immediate financial gain, rather the additional exposure for your property. People looking for bargains will see your auction and consider staying at your property even if they’ve never heard of it before. To increase your exposure, post auctions as long as possible. To encourage early bids, list the starting price as low as $10 or even $0! To encourage more bidding, make sure your reserve price is set as low as possible. If people continue to bid yet are unable to meet the reserve, they will get discouraged. This effort to “protect” oneself might ultimately eliminate the possibility to sell the auction. Remember, the one room for one week is not the sole purpose of placing the auction. It is the hundreds, even thousands of people who will be exposed to your property.

Travel Trade Advertising

Directories
There are a number of directories such as the “Goldbook of CHA” that will list your property for a nominal sum, and some of these will list free of charge. These and many others are used by travel agents and airlines, you should make sure you are listed in as many as possible.

Guidebooks
There are also a number of standard guidebooks to the Caribbean that are updated annually by the editors. You cannot pay to be included in these, but you can send details of your hotel to the editor, together with a personal invitation to your hotel if he/she is planning to visit when doing the update. The public relations agency of your tourist board can also help ensure your inclusion in such publications as:
- Fielding’s Guide to the Caribbean
- Fodors Guide to the Caribbean
- Fisher’s Guide to the Caribbean
These and others are primarily used by consumers, but are also references for newspaper and magazine writers.
NEWSPAPERS AND MAGAZINES

Travel trade newspapers and magazines cost much less than consumer advertising. They reach travel agents and airline personnel and are very effective both in exposing new properties and keeping older establishments in the travel agent’s mind. They can be used to advertise a new package or additions to your hotel. Most of them run special Caribbean Sections regularly. Your hotel advertising should be run in these to gain greater visibility and benefit from editorial features about the destination. This is one of the very few publicity areas you can handle entirely on your own, by sending releases on your hotel stationery and 8” x 10” black and white pictures to the editor. In this way you can announce to travel agents a new feature, a new package, a management change. When a group of travel agents has visited your hotel photograph them (without glasses in their hands), and caption with accurate names and agencies.

NEWSPAPERS

Newspaper Advertising can be very expensive and in most cases it is not very productive for the small hotel. If, however, you want visibility in a special market area, a small ad in a local newspaper can be productive - particularly if it is tied in with other hotels in the Caribbean, or airlines or the tourist board advertising for your destination.

HOMETOWN NEWSPAPERS

If your guest is from a small city or a suburban area with a newspaper, you can send (with his/her permission) a captioned 8”x10” black and white photo of the guest and/or family enjoying your hotel. Get details from the guest - and make sure the paper does not receive it until the family is back home. Obviously this does not work with big city newspapers.

MAGAZINES

Magazine advertising is very expensive, but can be highly productive, if you are out to attract special market segments for example:

- Honeymooners
- Scuba divers
- Golfers
- Senior citizens
- Sailers
- Gourmet
- Family Vacationers

Magazine advertising may be a necessity. Once again it is important to try to place your ads as part of a special Caribbean or individual island section of a publication, or when you know editorial material is being run that will make readers think of island vacations.

Some magazine advertising may result in returned coupons filled in by people who want more information about your hotel. This can be a pitfall for a small hotel with a limited budget, because readers of travel magazines are notorious for checking off every possible destination on their wish list. Typically one would get over 1000
responses in the form of mailing labels, resulting in a high cost. Make a log. See whether any of these were converted into actual bookings. If so:

- What was the number of people
- The length of stay
- The actual expenditure
- There is probably no better way to evaluate the advertising dollars you’ve spent.
- Unfortunately, many small new hotels do not set aside enough money for advertising and pre-opening expenses.

RADIO & TELEVISION
These media are usually more expensive for paid advertising by small properties. Some stations, however, will allow you to buy time and pay for it on a “due bill” (an exchange of services, for rooms and meals that the station will use).

TV game shows and other give-away programs are always interested in prize trips to Caribbean islands, and will feature the hotel at which the prize is taken. The public relations agency for your tourist board can investigate these possibilities. If a show is visiting your area to tape on location, the tourist board will probably be in charge, since the large number of rooms and air tickets required make it a national promotion. Even if you can’t accommodate them all, your floor show, your buffet, or your picturesque beach bar may warrant a special visit. Once again, liaison with your tourist board is the key.

Don’t underestimate charity, PBS television auction contributions and sponsorship events. They can be both rewarding for you financially and make your staff feel good too. You can give vacation packages in which you contribute rooms and co-opt other local businesses such as day sale operators and car rental companies to add features, return, for publicity on PBS stations and at big charity galas in major markets. Also since the guest perceives that they are getting a free vacation, they spend more at the bar, restaurant and boutique.

COOPERATIVE PROMOTION AND ADVERTISING
When you plan promotional trips to your prime market area, make arrangements well in advance - and make use of your resources there. Your hotel representative can direct you to the key travel agents and wholesalers who can build your business.

The district sales manager of an airline serving your destination is a prime source of information and can arrange opportunities for you to brief the ticket office, tour desk and telephone reservation personnel.

If your tourist board has offices in these
market areas, they can open doors, accompany you on sales calls, and advise you on the best approaches to different sectors of the travel trade.

Your local hotel association is generally the best way to be included. These people can also help you encourage travel agents visiting your area, to visit your hotel. Many airlines favour joint advertising programs, as do wholesalers and tour operators. Even small hotels can get in on the action, as such programs offer a wide a range of properties (and prices).

PROMOTIONAL TRIPS
In order to promote your property in the market, it is necessary to make personal calls on travel agents. This can be done by a number of hotels which get together and work with their tourist boards on a promotional trip.

A TOURIST BOARD PROMOTIONAL TRIP
When participating in a tourist board promotional trip, it is customary for them to make all prior arrangements for you to be accompanied on your calls by someone familiar with the area. However, the tourist board trip differs from the individual trip insofar as it sells the destination rather than the individual hotel. During a tourist board promotional trip, the hoteliers will attend:
- Breakfast seminars
- Luncheon
- Cocktail presentations
- Other get-togethers

These provide a chance to meet the travel agents and discuss mutual business interests. Since the tourist board usually pays for the major part of the promotion, the area as a destination is the prime feature and it is up to you to promote your individual property.

FAMILIARIZATION TRIPS
Another way to promote your property is to invite travel agents to your area on familiarization trips.

These trips are usually organised by the tourist board in conjunction with airlines or wholesale tour operators. Although many hotel representatives will organize their own trips.

When a travel agent arrives at your property, whether he or she is on a group tour or individually, you should go our of your way to wine, dine and entertain him/her. See that he/she has a good time while visiting with you.

Make sure the travel agent is shown a room and all of your facilities. Give him/her a brochure and rate sheet, and make sure he/she is completely familiarized with your property and impression on him/her. An average agent call will cost from US$10.00 to US$50.00, so make the most of it.

Your local tourist board or its agency overseas is likely to know when newspaper or magazine writers are due to visit on assignment. Make sure they think of your hotel first when they are arranging itineraries.
Make sure you are remembered when writers who specialise in your topic come for a visit. Have black & white photos taken professionally to emphasise your special assets, always have these and written information available.

RESEARCH

REGISTRATION CARD
Your registration information is your hotel’s “history book”. The registration card should be attractive yet simple so as to be hassle-free to complete. Include email address and birthday/anniversary date on sample form in appendix section of manual). A well thought out registration card can yield most of these facts, which combined with a few notes by an observant manager, can be a gold mine of marketing information.

GUEST PROFILE
Another insight into your product can be gained by comparing your guest profile against those of others on your island. Many governments compile this information on an island-wide basis. If you can obtain copies, you will learn whether your hotel conforms to the norm, or you may discover something that sets it apart from the competition.

GUEST QUESTIONNAIRE
The simplest and least expensive way to monitor your marketing program is to ask your guest what made them choose your hotel. This may be done by means of a simple questionnaire left in the rooms, with a request that it be filled out before departure (a good method also to find out more details of guest response to your product). The question may also be raised in informal conversation. Ask your guests if they were:

- Guided by a travel agent
- The advice of a previous guest
- They saw your ad. and if so, where

Over a period of time you will discover how your business is being built.

INFORMAL RESEARCH
You may also want to conduct some informal research among your current guests, to ascertain their likes and dislikes. Identify three or four pieces of information you need and elicit the answer through conversation (e.g. what do they do for entertainment, what is their favourite magazine or tv programme, etc.).

- Check a good cross-section of your guests and record the results on their registration cards.
CHAPTER EIGHT

INSURANCE
INSURANCE AND RISK MANAGEMENT

The world insurance and reinsurance markets have been severely hit by the terrorist attacks in the United States on September 11, 2001. These events have fundamentally changed the way insurance companies look at business in terms of what they insure and how they insure. Underwriting guidelines and attitudes have become much more conservative and greater scrutiny is now being placed on the types of risks insurance companies will insure.

The industry as a whole is now faced with massive payouts as a result of man-made catastrophes caused by terrorism and this is further compounded by the fact that there has been a continuing series of natural catastrophic events over the last few years. This has forced the international reinsurance companies and as a consequence, insurance companies, to implement new, stringent underwriting measures in order for the industry to sustain itself and remain viable.

Some of the measures being undertaken by reinsurers and insurers include:

1. Imposing higher deductibles.
2. Dramatic increases in rates and premiums
3. Imposing policy sub-limits.
4. Severe restriction of certain types of coverages, with complete withdrawal in some cases.
5. Requiring policyholders to self-insure more of the risks they face.
6. Imposing premium warranties, which require full payment of premium within a short time.
7. Scrutinizing all claims much more closely before making payments.
8. Promoting the implementation of formal Risk Management programmes as a strategy for reducing risks.

The net effect of these events and developments is that all Caribbean Hoteliers, large and small, will face some challenging insurance issues in the short to medium term, as insurers and reinsurers adjust to the changing and volatile environment in which they operate.

Perhaps the most immediate challenges hoteliers will face are the increase in premiums and the difficulty in obtaining full coverage for certain types of insurance such as Public Liability.

Hoteliers will therefore have to adopt a new and more focused approach to this critical matter of their insurance arrangements. It is imperative that all hoteliers now carefully review and analyse their existing insurance policies to be certain that they are in order and to ensure that whatever policy changes their insurance companies seek to implement, will not leave them unnecessarily exposed to potential losses or liabilities.

It is highly recommended that this type of review and analysis be undertaken with the assistance of an experienced Insurance Broker.
RISK MANAGEMENT FOR HOTELIERS

Given the recent developments in the insurance markets, hoteliers would be well advised to give serious consideration to developing and implementing a risk management programme for their business as part of their overall strategy for managing the various exposures they face on a day-to-day basis.

Risk management is simply a discipline that is intended to protect the assets and profits of an individual or organisation, by reducing the potential for losses, damage or liabilities before they occur.

Risk management for hoteliers could become quite an in-depth and involved strategy involving committed human and financial resources depending on the size of the hotel or hotel chain. For most hoteliers however, a simple, well thought-out risk management programme could prove to be invaluable to the hotel in the long run.

A typical risk management programme will cover four basic areas:

- **Risk Assessment** - this concerned with identifying and quantifying all the risks that the hotel is exposed to and which threatens its assets and profitability.

- **Loss Control** - this has to do with reducing the frequency and/or severity of losses through the implementation of certain management techniques or measures aimed at avoiding, eliminating or reducing the extent of losses, which may occur.

- **Risk Transfer** - this is where the funds for paying losses incurred by the hotel originates from a source outside the hotel, i.e., shifting the cost to insurance companies. In this way the hotel should be able to continue its operations following any insured losses that it may suffer.

- **Risk Monitoring & Review** - once implemented, hoteliers would need to continually monitor and assess the programme to ensure that the results expected are being achieved.

The whole exercise should be part of a conscious, total business management strategy, designed to protect the hotels assets, earnings, liabilities, guests and staff with maximum efficiency and minimum costs. Critical to its success however is the clear and unambiguous assignment of insurance and risk management responsibilities, along with the relevant authority, to a specific individual or individuals who have a clear understanding of its importance.

CRITICAL COVERAGES FOR HOTELIERS

PUBLIC LIABILITY INSURANCE

Let us first look at the area of public liability insurance. It is an established rule of
common law that a business enterprise has an inherent responsibility to protect its customers. In the hotel, leisure and tourism sector this is critically important and particularly so in the Caribbean where most of the travelers to the region are from territories that have highly litigious business environments.

The wide range of services and facilities offered by hotels, ranging from spa treatment to a variety of water-sports activities, make them very vulnerable to third party liability claims. Extreme care and attention has to be at the centre of all these services and facilities so as to ensure that avoidable mistakes or mishaps are not made, as the financial consequences can be very severe. Effective management will always be the first line of defense in preventing exposure to avoidable risks.

If a hotel is negligent and fails in its duty to protect its guest from personal injury, including death and property damage, it becomes legally liable for any losses arising. However, in order for a claimant to show legal liability on the part of the hotel, they must show that a legal duty was owed to them and that this duty was breached.

It is the hotel's responsibility to provide a safe environment for its guests and so it must have an effective safety program in effect. The hotel should ensure that its employees are made aware of its existence and should conduct regular in-house training sessions for all employees on its safety procedures and guidelines.

The hotel should always maintain proper records of its safety programme as the more evidence there is that it has strived to maintain a "safe" hotel, then the stronger will be its position in the event of a claim.

The following are some key guidelines all hotels to follow:

- Exit doors must be properly marked.
- Proper indoor and outdoor lighting should be installed.
- Handrails must be installed where necessary.
- Warning signs must be used to advise guests of any unusual hazards.
- Pay very close attention to food handling and personal hygiene of staff.
- Ensure supply of safe drinking water, particularly after storms/hurricanes.
- Have available at all times medical facilities, first aid and transportation.
- Use qualified instructors for services that require personal attention.
- Have a Disaster Plan. Liaise with relevant local authorities on this.
- Ensure Concessionaires have their own Public Liability insurance and obtain Hold Harmless agreements.
- Ensure that playgrounds, if provided, are safe.
- Maintain swimming pools daily and have clear depth makeings and other relevant signs.
- Use Disclaimers for activities that may carry certain risks such as horseback riding, water-skiing and diving.
Implement a simple but proper incident reporting system.
Provide reminders to guest for their own personal safety.
Give immediate attention to any personal injury.

CONCESSIONAIRES OPERATIONS
It is common to have certain concessionaires operating within a hotel, providing services and facilities such as:
- Restaurants
- Lounges
- Beauty Shops
- Gift Shops
- Water Sports
- Tours
- Car Rental
- Health Club
- Golf Club

It is extremely important, that the concessionaires carry their own separate insurances and that the hotel makes absolutely certain that it has signed contracts with "hold harmless agreements" with these concessionaires.

Hoteliers should take special care to ensure that they:
- Do not advertise or recommend in their brochures, websites or otherwise, any service being offered by a concessionaire for which the concessionaire has no insurance.
- Post disclaimers in rooms advising that activities and services provided such as water sports and horseback riding are undertaken at their own risks and as such they should always exercise good care and judgment.

Hoteliers should obtain from the concessionaires proof that they have insurance in force on an annual basis by providing a copy of their insurance certificate or cover note. It is important that the limit of coverage the concessionaires carry is adequate and this may vary from territory to territory.

In light of the current hardening and restrictions in the insurance market, small concessionaires may experience difficulties in obtaining Liability insurance or at levels that the hotel may deem adequate. At the very least, hoteliers should require from concessionaires coverage from US$1,000,000.00 and beyond for bodily injury and property damage. In addition, hoteliers should ensure that they are included as an additional named insured under the concessionaire's liability policy.

WORLDWIDE CLAIMS JURISDICTIONAL COVERAGE
When does a hotel need worldwide claims jurisdictional coverage under its liability policy? This will depend on whether it has any holdings or even sales representatives overseas, especially in the U.S. and Canada. If there are no financial ties with these countries, then the hotel can purchase liability insurance with the local claims
jurisdiction provision, which is far more economical.

Before a hotel makes this particular decision, it would be wise to check first with their insurance broker or representative, lawyer and accountant.

PROPERTY INSURANCE
In this area of property insurance, the recent hardening and restrictions in the insurance market have affected virtually every hotel in the Caribbean.

Reinsurers are turning away from the Caribbean, where many islands are subject to both hurricanes and earthquakes, and where the theory of global warming, and its resulting change in weather patterns is of great concern to reinsurers.

All indications are that this adverse market situation will not change soon and will depend heavily on how the international reinsurance market is affected by on-going world events, both in terms of natural and man-made disasters and catastrophes.

Hotels in the Caribbean must therefore be prepared to face and brace themselves for some of the measures now being taken by insurance companies as outlined at the beginning of this chapter.

The essential points to note regarding property insurances are:

1. Adequate Sums Insured
Ensure that the hotel property is adequately insured for its replacement/reinstatement value against physical loss or damage. Hoteliers should also ensure that their main machinery and equipment are also included under the property insurance policy. Avoid deliberate underinsurance as much as possible as this could seriously affect the amount recoverable from a claim. It is advisable to get a proper valuation done on the property.

2. Scrutinize Scope of Policy Coverage
Hoteliers are advised to examine closely the scope of cover their property insurance policy provides to ensure they are getting coverage for the main risks they face. Some important perils are not included in the standard policy and so coverage may have to be specifically requested, e.g. Subsidence and Landslip. This is best done with the assistance of an experienced insurance broker or agent.

Beachfront properties in particular must ensure that their property insurance covers sea-wave action or overflow of the sea. Where several Buildings are being insured under the same property insurance, it is advisable to list each building separately for its respective replacement/reinstatement value. This is important in terms of how the policy deductible for catastrophe perils is applied in the event of claims. When buildings are itemized in the policy

3. Maintenance/Housekeeping
Ensure that the buildings and surrounding areas are well maintained and that general housekeeping is kept at the highest standard, particularly in kitchens, machinery room and storage areas. A prudent underwriter will rate
a poorly maintained property accordingly. Electrical systems must be checked routinely.

4. **Timing of Policy Dates**

It is advisable not to have your property insurances expiring in the middle of the hurricane season, usually between August and September as Caribbean insurance companies are typically at that time of the year pre-occupied with the daunting prospects of several tropical storms and hurricanes.

Insurance companies will obviously be less inclined to offer favourable policy rates for a pending renewal if they know that a major hurricane is on its way or if the renewal date comes due on the heels of a damaging tropical storm.

5. **Get Professional Advice**

Insurance can be a complex matter to deal with as it entails many legal issues and details. The proverbial "fine print" of insurance contracts still remains a haunting aspect in deal with insurance matters and particularly claims.

A professionally qualified insurance broker, agent or consultant is best placed to assist the hotel in these matters as they know how to "speak the language" of insurance companies. They will be able to advise the hotel on its insurance requirements and make recommendations on how best to structure and organize its insurance portfolio.

**Who is an Insurance Broker?**

An Insurance Broker is an independent professional that works on behalf and represents the interest of policyholders such as hoteliers. The primary role of the Broker is to give professional advice and direction to policyholders in the handling of all aspects of their insurance.

**Services Provided by Insurance Brokers**

As independent insurance professionals, their core business is in providing professional Insurance Broking and Risk Management Services to a wide cross-section of Corporate, Commercial and Industrial clients as well Private individuals.

Their role and function in the hotel sector is wide-ranging, but would primarily include:

(a) Providing on-going professional advice on the insurance requirements of hotels and providing a vital link between hoteliers and insurance companies.

(b) Acting as an independent, intermediary link that brings the Insurers and the hoteliers together in a spirit of goodwill, mutual trust and long term relationship. Insurance Brokers are completely free in placing insurance with any company that offers the best overall deal for hoteliers.

(c) Negotiating with Underwriters both regionally and internationally for the most appropriate policy terms and conditions at costs that are competitive. They undertake to do all the legwork in arranging policies of insurance on behalf of hoteliers.

(d) Undertaking Risk Management Surveys on behalf of hotels when necessary in order to identify, analyse and evaluate risk exposures and recommend the appropriate risk management techniques to control, prevent or eliminate these exposures.
(e) Advising on changes in Insurance Law and practice, both local and international and collecting and disseminating market intelligence where such information may impact on the insurances of hotels.

(f) Insurance Brokers owe their clients a "fiduciary" duty, fiduciary meaning 'held or given in trust'. They are responsible, in a 'fiduciary' capacity, for all funds received or collected on behalf of hoteliers. Whenever money is paid to Brokers by hoteliers for onward transmission to Insurers or vice versa, a trustee relationship comes into being between both the hotel and the Broker. This relationship is of vital importance to hoteliers because if a broker should become insolvent, under these circumstances, proprietary remedies become available to the hotel.

(g) Giving professional claims advice and negotiating a fair and timely settlement to the hotel's best advantage. Brokers would assist in ensuring that claims documentation are properly prepared and submitted to Insurers. Additionally, Brokers would seek to ensure a continuity of relationship to make the insurance business mutually desirable and beneficial over a period of time.

(h) In addition to being negotiators, Insurance Brokers also act as facilitators in the placement of full coverage for a business which may have a very large property portfolio, which a single and direct Insurer may not have the capacity to fully accommodate on its own. This is done by using a select panel or consortium of Insurers to participate as co-Insurers of the total risk. Each company would assume a given percentage of the total risk and collectively they would cover the risk 100%.

(i) Assisting in development of new forms of cover to cope with increasing demands from the insuring community for cover for sophisticated or unusual risks, often encountered in developing economies where new industries or commercial activities are emerging.

(j) Developing a special relationship between hoteliers and themselves in such a way that they create firmly established partnerships wherein both parties work closely with each other for mutual profitability and long term success.

(k) Building customer trust and loyalty as a key priority for sustainable growth and stability of the hotels business portfolio.

The services provided by Insurance Brokers are at no additional premium cost to hoteliers as brokers are paid a commission directly by the insurance companies they place business with.

What to Look for in An Insurance Broker

- Professional qualification in insurance business
- Reputable track record and good image
- Integrity
- Experience in managing insurance portfolios of hotels
- Good market connections and support system

A good, effective Insurance Broker could be found by making enquires of other hotels or other companies who use the services of a broker. "Word of mouth" may well be the
best way to identify the right Broker. In some territories an Insurance Broker may not be readily available or there may not be any Brokers operating in that territory. There are a number of Insurance Brokers that operate regionally that could assist hoteliers with their insurances. Networking with other hotels in those territories that have a well-developed Insurance Broking sector could prove to be very beneficial.

BUSINESS INTERRUPTION INSURANCE

Many business places over-look this important insurance policy even though it has been proven to be of tremendous value to those who have been able to benefit from having it.

Hotels in the Caribbean face almost certain temporary closure if they are affected adversely by fire; storm, hurricane and other insured perils, particularly since they depend mainly on overseas travelers for business. During the period of closure or interruption the hotel will suffer financial losses as a result of the shortfall in expected revenues. The indirect loss which follows a storm or hurricane is not covered by most property insurance policies so even though the hotel may be able to recover their property damage losses, they could still find themselves seriously out-of-pocket.

Imagine a hotel suffering major fire damage on the eve of what was predicted as a bumper tourist season and had to close for two or three months to effect repairs. Not only will important revenues be lost, the hotel would still have to meet certain business expenses such as loans and interest payments, salaries, utilities and taxes and may also incur additional expenses in an attempt to shorten the period of interruption. This could put severe financial pressure on the hotel to draw on its reserves to meet these commitments and could have serious consequences if the closure is for an extended period.

Business Interruption insurance provides coverage for the reduction of income during the shutdown period and may well be the determining factor in whether a damaged hotel recovers or not.

CLAIMS GUIDELINES AND PROCEDURES

It is a given that losses will occur. The questions really are:

- When will it be?
- What will it be?
- What will be the extent?
- How will it be handled or resolved?

There are some useful guidelines and procedures, which hoteliers should follow to assist them in managing claims or situations that potentially could lead to losses. These include:

- Mitigate losses by doing what could be done immediately to reduce the extent of the loss.
- Notify Broker, Agent or Insurer of loss or
incident with undue delay.
- Take pictures/video of damage if cleaning-up or clearing has to be done immediately.
- Obtain statements from witnesses as this may come in useful.
- Activate any contingency plan the hotel may have to keep operations moving smoothly.
- Document, document, document!!! It is better to have an abundance of records and information on an event than not enough.
- Obtain estimates of repairs/rebuilding etc.
- Prepare & submit detailed claim in conjunction with the insurance broker, agent or consultant.
- Do not admit liability or offer settlement to any third claimant until the insurance company is advised of the incident and agrees as this could prejudice the hotel's claim.
- Submit to Broker/insurance Company immediately any summons, writs or notices received from any third party claimant.
- Co-operate fully with Loss Adjusters or representatives from the insurance company and provide information requested.
- Negotiate for Interim Payments through Insurance Broker to assist recovery.

GET TO KNOW THE INSURERS

During these critical times, it is of the utmost importance that hoteliers make certain that their insurance company is financially sound, has a good track record, and will be able to meet its obligations when the need arises.

How did they perform following recent hurricanes?

What is their reputation and track record in the market?

Who does their adjusting in case of a major catastrophe?

Will the insurance broker or consultant recommend them in writing?

Will the company guarantee that they have adequate reinsurance treaties in place?

It is a known fact that when insurance coverage becomes less available and premiums escalate that many buyers will be tempted to seek coverage from the cheapest source. While this decision may be driven by economic reality, there is often a down side to this which hoteliers must be mindful of.

Policies that are being offered at prices significantly less than the rest of the established market should be scrutinized with extreme caution, as they may not provide the level of coverage required by the hotel.

Also, during a restricted market phase such as we are now facing, unscrupulous players will enter the market in an attempt to take advantage of the situation. If hoteliers are in doubt about an insurance product being offered to them, they should contact their insurance broker, consultant or the Caribbean
Hotel Association/General Agency Corporation and receive their professional advice.

**FINAL COMMENTS**

It is essential that hoteliers recognise the vital importance of insurance and risk management and their role in making the tourism business sustainable.

In view of this, hoteliers need to use insurance and risk management as strategic management tools.

There are no real shortcuts to quality insurance protection. Hoteliers should focus on the quality of insurance coverage they purchase and on closing any loopholes in their policies.

The point on using professionally qualified Insurance Brokers must be re-emphasised. There is no additional charge in the final premium for utilizing their services and the hotel stands to benefit from their professional advice and services. Seek their advice and comments from a risk and insurance perspective on new activities and projects in the hotel, before implementation. This is a win-win situation for hoteliers. It is critically important at this time that hoteliers keep their insurances current and up-to-date and avoid policies from being cancelled or lapsed unless they are no longer relevant. Re-instatement of coverage may involve higher premium costs and more restrictive policy terms and conditions.

Self-insurance is an option open to hoteliers for certain types of insurance such as Computer and Burglary insurance, depending on the hotels security arrangements. However, it is important to seriously consider the financial ability of the hotel to withstand any potential loss that may occur for risks that it chooses to self-insure. If the hotel believes that their exposure is minimal based on certain measures or security procedures that have been put in place, then it may be alright for the hotel to carry the risks themselves.

Hoteliers must avoid last minute insurance arrangements, as coverage may not be available at that time. One cannot insure a burning house! Do not wait until a hurricane is looming to try and increase the sums insured on buildings or equipment if it is know that these items are underinsured. Insurance companies are smart at their game.
INTRODUCTION
Computers are ubiquitous in our modern society and are developing at such a rapid rate; it appears to be only the tip of the iceberg. They now influence every aspect of our lives and are in use in almost every field, the hospitality industry being no exception. In fact, it has become such an essential business tool, that in some cases, it may be impossible to succeed without them. Its use within the hospitality industry is increasing daily and new applications are continually being developed to serve the ever-multiplying needs of the industry. Hotels throughout the world are increasingly using computers for automated methods of booking reservations, accounting, stock and other general office uses. The use of computers has also accelerated since the advent of the Internet, a medium that is increasingly being used by hotels for their sales and marketing activities.

The extensive use of computers has created a digital convergence that has made it difficult to separate computing and telecommunication issues. Today, it is possible to make a phone call and send fax messages over the Internet. Even the entertainment industry is now evolving the computer industry.

This chapter attempts to provide a brief background to the development of computers, with particular emphasis on today’s desktop personal computers, their uses and describes a number of systems, services and software programs that have application to hotel and hospitality-related businesses, and also takes a short look into the future, to describe forthcoming technologies which are likely to have significant impact on the industry throughout the Caribbean.

COMPUTERS: BACKGROUND
GENERAL EVOLUTION
Since the arrival of the first commercial computers in the early sixties, massive changes have taken place: the first machines were physically enormous, occupying whole suites and sometimes whole buildings, and requiring large numbers of dedicated staff to keep them running, to code the programs, input data and then to decode the results into human-readable terms.

During the mid sixties and early seventies, improvements in the design and manufacture of integrated circuits (chips), permitted significant reductions in overall size and cost of computers, great improvements in performance and reductions in the numbers of staff serving the machines. It is these technological advances that led to today’s down sized Personal Computers (PC).

Two young entrepreneurs - Steve Wozniak and Steve Jobs formed a company, and developed and marketed one machine that was a lot more attractive (it could produce output on screen in colour and with simple graphics), more usable and “friendlier” than
the majority of systems available in the late seventies. The computer was called the Apple.

Once launched, it was so successful that many software program writers who had hitherto only worked for the large ‘mainframe’ companies began turning their hands to the development of programs for the Apple. This helped sales to take off, and for Apple to seize a majority share of the PC market by about 1980.

As Apple (now simply called Mac) grew in size and importance, many companies began to take note, especially when it became clear that the PC market was going to grow very rapidly. One such company was IBM, which set about designing a PC and finding a supplier to provide an operating system for its machine. Their first machine that supported bulk storage was introduced in 1983 and was called the IBM PC-XT and the Operating System was later known as MS-DOS, from a company called Microsoft.

Within a few years, the IBM-PC became the industry standard and almost all other manufacturers of small computers began to make copies of the IBM machine, known as Clones or Compatibles. From the inception of the first IBM PC until today, there has been continual competition between the various manufacturers, which has resulted in IBM losing dominance of the industry, including their naming conventions and all small computers are simply called “PC”, including the Mac. Technological developments have resulted in further miniaturization, at the same time improving speed, performance and capability.

CPU’s AND MICROPROCESSORS
The early, large computers depended upon a Central Processor Unit (CPU), which was constructed from many thousands of individual components. Their immediate successors, the ‘mainframes’ were intended to support large numbers of users and took advantage of the development of integrated circuits to build ever-faster CPU’s. In the late 1970’s, a number of companies had commenced design and prototype manufacture of much smaller CPU’s, usually within one single chip, which became known as Microprocessors.

The Apple depended upon a chip called the 6502, while the IBM PC-XT used the Intel 8088 and 8086 - the first of many generations of Intel processors, leading up to today’s Pentium based systems. Today, Intel is strongly rivaled by a company called AMD and these IBM based systems account for almost ninety percent of the PC market. Apple Computer changed from their early products to the range now known as the Macintosh (or Mac for short), which employ the ‘68000’ range of Microprocessors, made by Motorola.

OPERATING SYSTEMS
A computer is incapable of doing anything until it receives a set of instructions which it is able to decode, telling it how to interface itself to the outside world (and hence to the
user). It needs to be told how and where to access what are known as peripheral devices, such as data storage disks, keyboard, screens, printers and communications ports. Only then is it able to access whatever program the user wishes to activate, load it into memory and configure itself so that the user is able to proceed. The early IBM based PC’s used the Microsoft Disk Operating System (MS-DOS) which is now replaced by Windows, using a graphical user display similar to Apple. Apple has its own proprietary system for the Mac, which is incompatible with IBM PC’s though newer versions are able to read their file formats..

**USER ENVIRONMENTS - DOS AND WINDOWS**

The DOS environment is basically a text-oriented command interpreter. The user types a command, followed by pressing the ‘Enter’ key. The computer then attempts to interpret that command. If there is anything wrong with the command, or if the system is unable to find the program or file to which the command refers, then it will reply with an “Error Message”, which the user then has to interpret. Taken all in all, it has been found to be an unfriendly system, generally inhibiting to new users.

Today, relatively few PC’s run with pure text-based operating systems. The trend has been towards a user-friendlier graphics-oriented environment called a Graphical User Interface (GUI). GUI relies on graphic based software, which permits the integration of text with high-resolution graphic images.

The Windows family of operating systems from Microsoft is an example of such a graphic-based software similar to the Mac and today, it has become the predominant operating system on PC’s. Users interact with the operating system and other software packages using a pointing device called a mouse and a keyboard to issue commands. Rather than entering a command directly, the user chooses from options displayed on the screen. Pointing to and choosing one or more options from menus or by pointing to and choosing a graphics image called an icon, enter the equivalent of a text-based command. An Icon is a graphic representation of a processing activity. All windows operating systems after Windows 98 do not fully support DOS based programs. Hotels will have to consider upgrading all DOS based programs for various reasons including support and capabilities.

Learning time is cut to a few hours and productivity enhanced. The Windows system is equipped with many utilities that help users to find the programs and files that they wish to use.

One utility that stands out is the use of Context-Sensitive Help screens. Within Windows and most programs designed for Windows, it is possible to demand help. The Help screens will then assist the user to determine his or her next course of action, within the current program.
Where appropriate, the user can further be switched into a Tutorial program, which will demonstrate special functions of the program concerned, which in turn assists the user to achieve proficiency rapidly with even the most complex programs.

The reduction in learning time helps to promote confidence in new users and productivity in all areas of work is enhanced. Formal, short-term intensive hotel computer training is encouraged, such as that provided by the CHTI, to enhance staff confidence and efficiency in the usage of the system.

There are other competing GUI based operating systems to Windows. Linux is one such system but is not yet common on the office desktops due to the lack of support from other software packages. However, the commitment from software developers is growing and hardware manufacturers are increasingly using it on the high-end systems (servers).

Avoid under-use, misuse, abuse, and retaliation of your computer system. Call CHTI for hotel computer training today.

SOFTWARE - PROGRAMS

The very earliest PC’s had almost no programs written for them. Users had to write their own programs and store them on tape together with any data they had entered.

Once Floppy Disks and subsequently Hard Disks became available, steadily more and more complex programs were developed, allowing users to utilize their computers for ever more complex tasks, beginning with simple text editors for writing programs and free text files, leading to simple databases and eventually Word Processors. Comparatively crude calculators led to Spreadsheets and eventually to Accounting Systems and to complex Databases. As time progresses, programs have merged towards single entities which can perform multiple tasks, so relieving the user from the need to ‘know’ a whole range of programs, each performing a single task.

Hotel Property Management Systems (PMS) are a typical example of such a software suite, comprising interlinked programs, presented to the user in a seamless fashion such that each new function or task follows painlessly from the previous one.

The functions provided typically include setting up a database, unique to each hotel, listing the rooms, rates and services available, together with notes on many additional facilities, extra beds for children, for example, sea-facing rooms, versus rear-of-hotel rooms etc.

An accounting system which takes note of each guest registering, arriving and departing, taking input from hotel facilities, such as coffee shop, restaurant, bars, room-vending machines, telephone accounting systems, hotel-organised or sponsored trips etc., computing the final account, verifying the guests’ method of payment and recording the transaction.

The database will raise flags when or if an attempt to overbook the hotel is made although this can be a specific requirement.
where it is found that many advance bookings are subsequently cancelled.

Most PMS systems register advance reservations in the accounting systems so that more accurate revenue and cash flow projections can be made. Staff wages and costs can also be incorporated, as can invoicing from external service providers, leading to accurate financial statements and formal accounts reporting.

PMS systems can further be integrated with the Internet, allowing automatic advance remote reservation bookings as well as block bookings, without the desk clerk having to re-key input for reservations presently received by fax.

The advent of the Internet has revolutionized the Hotel reservation process, allowing reservations to be done directly, through other agencies or via e-mail. Most PMS systems can integrate with these services, which makes marketing and room sales more efficient and also providing quick and reliable information to potential customers.

Customer Relations Management (CRM) is becoming a critical component within the Hotel industry. To facilitate this, most PMS systems provide a customer history database, which allows the processing of reservations from repeat guest more efficient and friendlier.

PERIPHERAL EQUIPMENT
Computers are useless until they are connected to peripheral equipment, which permits humans to interface with and control them. This section attempts to cover typical peripherals that will be needed for most conventional PC installations suitable for running Property Management Systems.

Normally, PC’s are supplied already equipped with a colour screen, a mouse and a keyboard, a power cable (usually with an American plug on the end). Windows is normally pre-installed and possibly a bundled office suite such as Microsoft Office. Nevertheless there are many configurations possible, depending upon the specific type of work to be undertaken. The list below attempts to describe some of the more commonly available items in general terms, avoiding jargon and “computerese” as much as possible.

KEYBOARDS
The keyboard is the primary input device and is used to enter commands and data. While there are different types of computer keyboards, the most commonly used keyboard layout within the PC industry is the QWERTY. Apart from its standard layout, most keyboards have function keys, which when depressed, will trigger the execution of some software. Some keyboards have additional control keys that can control functions such as Internet access, power and media playing. Today, most keyboards come with a standard mini-connector. One can still come across an older type with a big connector, which can be interchanged with the newer ones with an appropriate adapter.

MONITORS
The Monitor or Screen is the most popular interface between the computer and the
human eye in seeing computer response to input data and computations. The flat screen types are gradually replacing the standard big “tube” monitor. Information can be displayed in either monochrome or colour. Monochrome screens are usually made to display white characters on a black background.

Colour Monitors come in a vast range of sizes and resolutions, the latter term meaning the number of dots (picture elements or Pixels) that can be displayed with sufficient contrast for the human eye to be able to detect and differentiate. The computer has to be equipped with a special card to produce the signals that the monitor requires and a number of naming conventions have arisen, to describe different types and qualities of display.

The “touch screen” monitor is a special type that is of interest to the Hotel environment. It accepts input data by touching the screen with the finger that has sensors for pinpointing the touch location. It can operate without the use of a keyboard and is suitable for the bar and restaurant environments.

VGA, meaning Very high resolution Graphics Adaptor, which has about the same resolution as television is the present standard offering from reputable suppliers and should be considered as the minimum acceptable standard when purchasing new systems. Other enhanced VGA standards are currently available on the market offering higher resolutions. They all use a standard connector to attach to the PC.

THE MOUSE
This is a pointing device, which enables you to position the cursor on the screen and communicate commands to the computer. After Apple brought the mouse to market, many manufacturers jumped on the same bandwagon, with the result that today there are many pointing devices available.

It is an input device only and can be connected to the system via a dedicated motherboard mouse port, serial COM port, USB port or wireless infrared. They are available in various designs namely: -

- The Basic Mouse, which is the most common.
- The Trackball, which is like a basic mouse placed upside-down.
- The Trackpoint, which is a pressure sensitive device, usually placed in the keyboard and common in notebooks
- The Intellimouse, which is a basic mouse with scrolling capabilities.
- The Touchpad, which uses a flat surface that senses finger motion, usually placed on a keyboard and common on notebooks. (Glidepoint and EZ Pad)

The basic or standard mouse is a small, roughly ovoid shape, which fits the hand well, and has two or three press switches on top, falling naturally under the fingers and a quite heavy ball fitted underneath, so as to detect when the mouse is moved.

PRINTERS
Printers are used to obtain a
hard copy of the work being performed with the computer. There are many kinds of printers, but they all fall under two basic categories:

An impact printer (e.g. dot matrix) is one that uses electromechanical force to transfer the print to paper; and

A non-impact printer (e.g. Inkjet, LaserJet and Thermal) has no electromechanical movement and are much quieter.

Printers are normally connected to the parallel port (LPT1) on the PC. However, with the advent of USB, Serial printers are also becoming very common.

**Dot-Matrix Printers**
A dot-matrix printer uses pins in a print head to strike a ribbon against the paper to form the characters. It has a poor resolution and graphics capability. Its use is currently restricted to multi-layered forms and high volume printing where resolution is not a critical issue such as printing bills, cheques etc. It has the lowest printing cost per page and noisy to operate.

**Laser-Jet Printers**
Intended for high speed and high quality printing, especially for word processing, some desktop publishing applications and general reports, spreadsheets, etc and a good choice for a quite environment. They are unable to print multi-layered forms and have the highest printing cost per page, so can only serve part of a hotel’s requirements. Colour lasers are also available on the market. Recommended for most PMS systems since their minimum memory requirements can be met.

**Ink-Jet Printers**
Similar to the laser printer except that it uses liquid ink to print on paper and can handle both black and white printing and colour printing, of anything up to and including acceptable reproductions of colour photographs. It has a lower printing speed and cost per page than the lasers and is only suitable for low volume printing.

**Others**
There are also pen plotters and electrostatic printers intended for CAD drawings. These feature extreme positional accuracy across very large paper sizes and colour plotting. Thermal printers are also available. Costs of such systems are extremely high.

**SCANNERS**
A scanner is a device that can read and interpret information on a printed copy and convert it to a format that can be interpreted by a computer. There are various types of scanners but the ones of most likely use in the Hotel industry are the document scanners (for printed documents and photographs) and magnetic card readers (for credit cards).

**FAX MACHINES**
This is a device that enables you to send a printed document through the normal telephone lines. The conventional machine consists basically of an integrated scanner and printer. Today, PC’s can send and receive faxes and can also be used in
conjunction with the conventional machine. All-in-one printers (copy, scan, fax and print) are widely available on the market. It is now possible to send a fax via the Internet.

**POWER LINE CONDITIONERS**

Electricity supplies vary enormously in quality and reliability. In the Caribbean, with the possibility of hurricanes, the high frequency of lightning flashes, and the unreliability of local electric power suppliers, it is recommended that every computer installation should be protected against surges, spikes and brownouts to some degree, by the provision of a line conditioner.

A line conditioner can absorb the worst of the spikes and will regulate the line voltage to limits acceptable to the computer. If the incoming supply voltage exceeds the limits of the line conditioner, then it will trip out, to protect the computer against catastrophic damage. You will lose all your unsaved work, however, a small price to pay for an undamaged computer.

**UNINTERRUPTIBLE POWER SUPPLY (UPS)**

The UPS is a device that receives line power and charges a battery, such that when a power outage occurs, it is able to continue supplying power to whatever equipment is connected to it, for a limited time, typically 15 to 30 minutes. This allows computer users to finish their immediate tasks, save their work, and to then shut down the computer in the normal way.

Main computers (servers) and most modern operating systems require an orderly shutdown process to avoid data corruption, hence, a sudden power down as would occur when there is a power outage is undesirable. A UPS will address this problem. There are also Smart UPS’s that will allow the system to continue operation up to a point where it can no longer sustain the system and automatically triggers a shutdown procedure without any user intervention.

Many UPSs have a built-in line conditioner that will both condition the output voltage and switch to battery in the case of a black out.

**MODEMS**

Modems are the devices that interface the computer via telephone lines or data lines to the outside world. Modems are usually described in terms of the speed at which they are able to transmit and receive information. Low-end modems operate at data transfer speeds of 2400 bits per second, which actually means a little over 200 characters per second. Today, modems in use within the PC industry are capable of a transfer speed up to 56,000 bits per second (over 5000 characters per second). Many modems are also equipped with a fax capability. A computer with a fax modem has several advantages. You can arrange to have your faxes sent at night thus saving money, the modem will retry for a specified number of times, and an attached printer can act as a plain paper fax machine.
NETWORK CARDS
A network is the interconnection of computers for the purpose of sharing information and resources. When a network is installed to serve a single organisation over a limited distance, it is termed a Local Area Network (LAN). When it spans a wider geographical area, it is termed a Wide Area network (WAN). The Internet is an example of a WAN. A Network Interface Card (NIC) is used to connect a computer to a network.

There are various types of networks, but the one most commonly used is the Ethernet. It is implemented using either coaxial or twisted pair cables. The former has been discontinued since there is no further development in its technology but can still be found in older installations. Developmental efforts are centred on the twisted pair version.

Networks allow special computers (servers) with very large storage devices to “serve” other computers by sharing data, applications and resources such as Point-of-Sale cash registers, printers, disk drives, modems etc., thus saving money.

CARD READERS
A card reader is capable of reading magnetic coded information on cards. One such use within the hotel industry is to read credit cards. The reader is usually attached to a PC for use with a PMS enabling direct input of card information to guest folios or to a telephone line for card validation.

THE INTERNET
The Internet is one technology that has caused radical changes in our lives and subsequently the way we do business. The Internet (or the Net) is a worldwide network of millions of computers that has emerged as the enabling technology towards our migration to a global village. It is also referred to as the World Wide Web.

The original idea behind the Internet was to share information or make information easily accessible to the wider public. At that time, educational institutions spearheaded its development from the time the original network was handed over to civilian control by the US military.

During the mid-90’s, this focus changed dramatically since most business saw it as a useful commercial vehicle. Today, the Internet is over seventy percent commercial and has given rise to the new business concept – “e-commerce”. The Internet has also proven to be an invaluable communication tool, enabling services such as e-mail, fax, file transfer, phone calls, video transmission, entertainment etc.

E-commerce has accounted for the success of many businesses. The Hotels are no exception and the larger ones have capitalized on it. Information about the Hotel can be posted on local or remote computers connected to the Internet referred to as a “Web Site” within the online community. Potential guest can access this information on the web site and
communicate their reservation requirements to the hotel via telephone, fax or e-mail.

The PMS system can also be integrated to the Web Site. In this way, it is possible for potential guest to get all the information that is needed, choose a room and make a reservation with immediate confirmation without any interaction of the hotel reservation staff. The web site can be developed to the extent that even a live tour of the rooms and facilities can be included.

Most Hotels operate an Internet Café for use by their guests. The technology is also available to avail this facility in all rooms and can even be a revenue generation service for the Hotel.

Access to the Internet can be via dial-up lines, ADSL, DSL, Cable or Leased lines. One would have to consult with their local Internet Service provider (ISP).

PROPERTY MANAGEMENT SYSTEMS (PMS)

PMS have evolved over time in accordance with user requirements. What was initially an extremely simple accounting package has today been transformed into a sophisticated suite of utilities and programs that are able to capture all the appropriate data concerning each guest, their utilization of facilities, services and their consumption of billable commodities.

As hoteliers and managers’ exposure to such systems has increased, so their expectations and the sophistication of the demands they place upon the PMS have grown in proportion. Reports have improved significantly in quality from these demands. In addition, PMS’s have had to be modified each time any new system reporting or generating revenue has been installed, with the result that all PMS companies have had to compete to catch up with whichever new facility their competitors have implemented.

Inevitably, as the complexity of the software has increased so has the learning time needed to understand the system. A survey of one such system showed that users benefited from experience of the hotel industry and computers in learning the software. Less visible requirements include the need for rigorous daily, weekly, monthly etc. backup policies and policing, as well as the need for good training, software support and maintenance.

As always prevention is the best medicine and it pays to ensure that staff are properly trained, since the majority of problems are generally caused by inadequately trained staff attempting to do things when they are unsure. Another aspect of this is the realization that an inadequately trained staff is unlikely to comprehend the necessity and importance of regular backup procedures.

A MODEL CONFIGURATION

Model configuration for a 50 Room Hotel -

The Gull Reef Club in the Caribbean Island of Amerigo has decided that it needs to enter the Electronic Age and to install a Property Management System. This means of course
that first we have to obtain a computer and all the necessary peripheral equipment, install and test the equipment, and then load the software, configure it for our hotel, make backups of the configuration and then (and only then) commence to train the staff and hopefully, after a day or two, begin to enter actual data.

POWER CONSIDERATIONS
In view of the vagaries of the electrical power supply, it will be necessary to use an uninterruptible power supply. At a minimum, the computer that runs the PMS system will require a UPS to ensure that the data it contains can be saved and the computer “shut down” gracefully in the event of a power failure. Other computers should also have a UPS and/or line conditioner to filter out surges and spikes.

A proper electrical grounding system is also needed to protect the equipment when thunderstorms occur. Ideally though, if there is a thunderstorm in the offing, then it is wise to shut down the computer and all peripheral equipment and to then disconnect everything from the power sockets. That way, other than a direct lightning strike in the actual room where the equipment is located, it is almost impossible for the system to be damaged.

LOCATION
Computers do not like dirt or water. Although this may sound silly, it is essential that they be placed in a clean, dry place with adequate ventilation/cooling, where dust does not collect, and preferably where people do not smoke while working at the computer (the ash tends to be drawn into the computer by the internal ventilation system).

BASIC EQUIPMENT
Computer
It is important to adhere to the minimum PC requirements recommended by the PMS supplier. However, most PC’s available on the market today exceeds the minimum requirements of most PMS’s.

A small network is recommended for the efficient operation of the facility, which may require the installation of a special computer called a Server. It is recommended that expert advice be sought in the design and installation of such a system.

Based on current pricing, a typical workstation PC should include the following minimum specifications:

- 128 MB of Memory
- 20 GB Hard Drive
- a 56Kbps Modem and/or a fast Ethernet Network card

A data backup device should be installed on the computer running the PMS, which can be a Zip, Tape or CD-RW drive. It is strongly recommended that a backup strategy be developed for the property to ensure that data and application software other than the PMS are adequately protected.

PRINTER
The minimum memory requirements of the PMS and the Hotel’s policy with regards to
the standard of its printed documents must be considered in choosing a printer. It is also recommended that the Hotel’s overall printing needs be considered in deciding a printing strategy. Again, the implementation of a network will reduce the cost of the printing needs.

**UPS**

All essential equipment should be protected from power disturbances. A suitable sized UPS should protect all critical equipment and seek professional advice before connecting any printer to a UPS. Some form of inexpensive line conditioners can protect all other non-essential equipment.

**TELEPHONE CALL ACCOUNTING**

Most PBX Switches are equipped with the option to record calls made from any extension to some external system such as a PMS. The Hotel should therefore ensure that the choice of PBX is one that has this option. This option makes it possible to input telephone data directly into the PMS software, together with any markup that you may wish to apply. Use of such a system will require the provision of a computer interface, usually obtained from the PBX supplier.

**SOFTWARE**

Typical recommended software should include, but not limited to, the following:

- PMS
- Professional Office Suite (e.g. Microsoft Office) with Word Processor, Spreadsheet, Database, Publishing and Presentation software.
- Communications for Internet access and FAX transmissions
- Utility to provide Antivirus protection that must be updated regularly. This can be easily done via the Internet and is necessary to protect against newer viruses.

**CRM**

Profitability is now a key issue for hoteliers as the Caribbean is faced with a dwindling tourism market, triggered by various factors. Revenue Management (RM) should therefore be a key component of the hotel’s operations that will enable them to sell the right product to the right customer at the right price through the right channel. Customer Relations Management (CRM) will play a major role in achieving this. The hotel will need to collect all sorts of information about their guests through various means. This will enable the hotel to target the right guests and help build lasting customer relationships.

**THE FUTURE**

Since the disaster of what is now known as the “9/11 disaster”, coupled with a global economic decline, the Caribbean Hotel Industry has faced tremendous strains and challenges, threatening their actual survival. We have also witnessed stiff competition from the cruise ship industry. This has forced many Hoteliers to review their
services, cost of service and the way of doing business. Technology can play a key role in this review and this section will attempt to highlight some new and emerging technologies, as well as those that currently available, that can assist in achieving these goals.

**HIGH-SPEED INTERNET**
Most Hotels in the Caribbean offer an Internet Café service and/or a dial-up service within the rooms to the local ISP on a commission basis. Alternatively, a broadband service can be leased at a fixed cost from the local ISP to their own Internet Server from which they can offer high speed access within the rooms at their own subscription cost. This is an opportunity for revenue generation. The disadvantage is that there is a high implementation cost and the broadband lease can be a monthly headache.

A careful analysis must be done, taking into consideration the Hotel size and guest profiles before going this direction. One advantage is that the hotel will be able to host its own web site and easily interface with third party agents. Direct reservations and confirmations will also be possible. Generally, their sales and marketing efforts can be greatly enhanced. Electronic hotel booking is expected to increase over the years.

**ENTERTAINMENT**
In-room video entertainment is a service that has been developed to complement the services offered by Hotels. It is an opportunity for revenue generation but suffer the same disadvantages outlined above in addition to licensing issues. Guest check-out feedback can also be incorporated, an essential component in Customer relations Management. This service can also be directly interfaced with the PMS.

**THE MOBILE INTERNET**
In recent years, there have been rapid developments in wireless technology, which promises to revolutionize the way of doing business. There is an increasing use of Internet–enabled mobile wireless devices such as PDA’s (Personal Digital Assistant), WAP (Wireless Application Protocol) phones, cell phones and wireless notebook computers, making it possible to access the Internet while on the move. It is anticipated that users with wireless Internet access will increase dramatically within the next few years. This Mobile Internet, also called Pervasive Computing, will dramatically change our lives; particularly in the way we do business.

**BLUETOOTH TECHNOLOGY**
Bluetooth is a wireless technology that uses short-range wireless frequency communications for both data and voice. It is being developed by the Bluetooth Special Interest Group (IBM is a founding and leading member) and enables communications among all sorts of devices such as PDA’s, WAP phones, Kiosks, wireless notebooks and networks without the need for any cables. Integrating Bluetooth technology with the Hotel’s computer network can increase hotel efficiency by providing a wireless self-service.
E-BUSINESS
The integration of Bluetooth technology and pervasive computing can revolutionize the way Hotels do online business. This has paved the way for a new concept in travel – “e-Travel”. Guests will be able to book a hotel, check in and out, and request special room services, all done automatically without the need of visiting a reception desk.

SUMMARY
The success of the Hospitality Industry depends largely on guest satisfaction, which will lead to a lasting customer relationship. In this way, the guest will be encouraged to visit again.

Computer Information Technology (CIT) has and is continuing to prove to be the most effective tool to achieve this goal in addition to improving overall Hotel efficiency.

The implementation of CIT will need some capital investment. Unfortunately, some managers do not accept CIT as a priority spending area (particularly the smaller hotels) simply because the return on investment is not always tangible. A proper analysis of the overall impact on the business is rarely considered.

With a rapidly growing online community enjoying the advantages of person-to-business from the comfort of their homes, hotels within the Caribbean will have to take a serious look into their CIT requirements if they are to remain in business. Small hotels should consider the implementation of, at least, a simple PMS system that is readily available in the marketplace at reasonable cost.

With all the hype about e-business within the hospitality industry, hotels will need to make a careful study to determine the need of such a technology before going in this direction. Customer feedback should be encouraged to follow the market demand.

Too often CIT systems are implemented and under utilised, with staff doing many things the old fashion way that is within the capability of existing CIT systems. Adequate staff training should be regarded as a priority.

The future is definitely on base in technology and the Caribbean hoteliers are encouraged to follow the market trend particularly in those areas that can result in reduced operational cost in an effort to market a lower priced Caribbean product.
CHAPTER TEN

TRAINING
TRAINING
The hospitality industry provides an opportunity for the small hotel operator to run a successful business. However one of the important factors in achieving business success is having well trained staff. Increasing customer expectations, changing times, growth in the industry, and the need for increased productivity indicate the necessity for ongoing training and employee development. With this in mind, it is imperative that the hotel operator plan for training, budget for training and ensure that training takes place on a regular basis.

TRAINING PROBLEMS & BENEFITS
Small Hotels face a number of challenges in relation to training. Let’s look at some of these very real challenges that surround training.

The first is **Time**. If you or a supervisor is conducting the training it takes your time, or theirs, to teach and the employee’s time to learn. There may be an urgent need for someone who can do the work correctly and there is often the pressure that there is not enough time to do training at the work station right now. If the employee is being trained off the job then this is time away from the job. Many hotel operations are so small that an employee out on training hampers the operation. You as a Manager may feel you cannot spare an employee away from the job, not even for a few hours never mind a day.

- Another challenge is **cost**. Your time and the employee’s time cost money. If staff is sent to attend a workshop off site or an external Trainer is brought in then this is an added cost. Training is often neglected when making financial plans as it is not considered a priority. But there is a popular saying “If you think training is expensive try ignorance”. Training is an investment in your business’ future and small hotels should see this as a worthwhile investment.
- Yet another problem is **frustration**. Many times employees are trained and then they quit. Or they are trained but they do not respond to training. It can be easy to give up on training because of these frustrations. Our response to frustration is to avoid the source. But this only temporarily reduces our frustration and in fact can create more problems. Consider the quote “Imagine if you trained your people and they left…..Now imagine if you didn’t train them …and they stayed”.
- Failure to clearly **communicate** our expectations often causes the problem. Some persons are knowledgeable but are unable to teach or convey the information in a way in which another person can easily understand. Sometimes the task is so routine we fail to communicate exactly what is to be done; for example, how to lift heavy boxes without hurting your back, how to correctly sanitize cutting boards, how to handle knives to avoid getting cut or how to hand a menu to the customer, so they
read the star items. It seems so simple to us, we think the employee should know how to do it.

- Sometimes the task as we see it, seems less important, unpleasant or even degrading. We prejudge the people who will perform this task as somehow lesser people. This feeling towards people will show in the way we train. Every task is necessary to the success of the operation and the person who performs the task is a part of our success.

**BENEFITS**

Yet for all the challenges described above, there are many benefits of training, benefits to both the employee and the Hotel Operator.

- For employees there is greater knowledge and enhanced skills, better performance, more job satisfaction, increased opportunities for promotion.
- For the hotel operator there is more efficient operation, better service, increase in guest satisfaction, and increase in revenue.

So, training is worth the investment as it’s a win-win situation for all, the hotel operator, the employees and the guests.

**TYPES OF TRAINING**

Training is the key to operational success. All staff from line employee to managers should be involved in continuous training to gain or upgrade their knowledge and skills. Training provides persons with enhanced knowledge, skills and attitudes.

Training can be done in several ways:

- On-the-job skills training by managers or supervisors with personal coaching augmented by written material;
- On-site workshops and seminars by experts;
- Correspondence courses or
- Attendance at off-site seminars at training institutions.
- Staff exchanges with staff from other similar hotels
- Mentoring programs

One type of training which should not be overlooked is “cross training”. Small hotels operations by their very size benefit from cross training. Having employees who are knowledgeable and skilled in the operations of departments other than their own, allows the Manager to draw on these employees during difficult periods. This can prevent breakdown in the service. All small hotels should adopt a policy of encouraging cross training which not only develops multi-skilled employees but allows for continuous service.

The small hotel operators has a choice of two format in which to conduct training:

- Group (class room) training: This is used most often when the content of the training is more knowledge based (theoretical) and the size of the group is 5 or more persons. A manager, supervisor or expert Trainer conducts in a classroom setting.
- On-the Job Skills training: This type of training is generally used when the content is skills based, can be
demonstrated one to one or to a small group of five or less employees. This type of training is ideal for small hotel operations as it is usually done at the works station by a supervisor or manager.

So although there are various ways of training, most small hotels will be engaged in skills based training. Skills based training always involves two critical steps:
1. Demonstrating the task and explaining to the trainee how to do the task.
2. Watching the trainee perform the task and correcting mistakes.

HOW TO SELECT AND ORGANIZE YOUR TRAINING PROGRAM

There is a procedure, which if followed, will assist you greatly in making your decisions regarding the selection, organisation and assessment of your training program.

NEEDS ASSESSMENT

First you should do a “Needs Assessment”. Whether you are considering a small program, possibly for only one department of your hotel, or an all-encompassing hotel-wide project, an objective training needs assessment should be conducted of your organisation. If you later intend to obtain outside funding assistance for your program through your hotel association and/or tourist board, this needs assessment must be thoroughly documented.

Training needs may be assessed by:
- Observation of service and work procedures
- Surveys of guest and employees
- Guest complaints
- Staff input at meetings
- Performance checklists review
- Professional external assistance
- Other means e.g. one to one interviews

COST

With the information from the needs assessment you can begin to develop a training plan. You may have started with some idea of the amount and type of training required. The needs assessment may possibly change this. In any case, you will now be better able to assess the costs of the program.

A feature of the costs will be to decide who is to carry out the training program. Consider if it is to be done in-house by managers and supervisors or by CHTI. Always check for cost estimates.

Having decided what type and size of program will best suit your purpose, you will also have to work out an estimated cost. Don’t let these costs change the purpose or direction of your training plan. If they seem a little high, there are ways to get assistance from organisations such as your local hotel association or the Caribbean Hotel Association.

ANNOUNCE TRAINING PLANS

One way of gaining support for your training plans is to communicate these plans to employees. Share insights on training
through meetings. Meet with employees either individually or in their departments to discuss planned training. Highlighting the benefits to them will motivate and encourage your staff to participate in upcoming sessions. Some of the key issues you should mention are:

- personal benefits and collective company benefits
- their professional development
- increase in guest satisfaction
- staying ahead of the competition
- the bottom line of increase revenue
- dates, time and location of the training.

**IMPLEMENT THE PROGRAM**

Plan and document individual training plans for each topic and department to be covered. These should include:

- Objectives that will be achieved
- Performance expectation,
- Trainees selected
- Methods of training e.g. demonstration, lecture, activity
- Equipment and materials (flipchart, markers, white or chalk board, manuals, hotel forms crockery, linens etc.)
- Training facility set-up (i.e. kitchen, guest room, bar dining room with access to “classroom” area for lectures)
- Audio-visual equipment (flip chart, overhead or LCD projector, video equipment e.g. television, VCR.)

Some busy managers delegate training responsibility to other employees or professionals in hospitality training. Whoever undertakes the task of training should:

- Enjoy teaching (preferably with academic and professional experience in teaching)
- Have professional experience in the job
- Possess good communication skills
- Be patient
- Have the time to train (and time to prepare)
- Respect and be respected by trainees.

**PREPARE YOUR OWN TRAINING PLAN**

Planning, implementing and evaluating an ongoing training program is a time-consuming process and a very important element in the success or failure of your operation.

Training is not a wasted expense, it is an investment. If this is new to you, too time-consuming or mind-boggling, do not hesitate to request professional advice and assistance through your local hotel association, or directly from the Caribbean Hospitality Training Institute (CHTI). Remember that training benefits guests, employees, and management. It is not an expense, it is an investment.

The training process is central to overall success. When we have decided where we want to go we must first provide people with the necessary tools. Training does that! It is not a panacea which fixes all, but it provides a road map. The hard work begins after the training, with practice, review and more practice until improvement is achieved.

**TRAINING HAS NOT BEEN EFFECTIVE**

To ensure you meet your goals, and get value for you money until the required change, you must have a plan.
The plan should be a well thought out road map, which will identify needs and allow you to achieve your vision. Training and development are as important functions as payroll and marketing. A budget must be assigned annually to complete the plan. Preparing a budget is a commitment which will help to when seeking funding.

Do no forget to look at other properties within your country with whom you can share training opportunities and cost.

The Caribbean Hospitality Training Institute also conducts group training sessions through your hotel association. This allows you as a Small Hotelier to send a few individuals for specific training at a lower cost.

Training can be accomplished in-house but must be carefully managed. Ensure your in-house trainer has been trained and is a certified trainer from attending one the Caribbean Hospitality Training Institute (CHTI) “Train the Trainer” workshops.

A combination of in-house training, external group training, correspondence courses or distance learning courses is recommended.

Be sure that your efforts are coordinated, that success is measured and that the effort is on-going and consistent. Too little, or inappropriate training will confuse the staff and produce the wrong effect.

Seek advice from specialist Trainers in your country or from CHTI to review training plans or for assistance with needs assessment.
demonstrate procedures and coach as needed. Divide the group into teams and have each team clean a room. Have the other team check and score.

PREPARE YOUR OWN TRAINING PLAN

GROUP TRAINING FOR RESTAURANT SERVERS (Sample)

Job
Waiter/Waitress

Unit
Food and Beverage

Task No 1
Communicate with Customers

No 2
Explain the Menu

No 3
Guest Check Procedure

TRAINING OBJECTIVE

After four fours and thirty minutes of training, the employee will demonstrate the ability to take a food order for a table of four completely and accurately, courteously explaining the menu to the customers and using correct procedures. The menu knowledge will be sufficient for most customer questions, but the trainee will know when the question is more complex and request information from the manager.

Material
- Illustration of service area in kitchen
- List of daily specials
- Guest checks
- Menu
- Menu abbreviations
- Menu holder
- Videotape of waiter/waitress taking an order for a table of four
- Videotape on suggestive selling

<table>
<thead>
<tr>
<th>TRAINING</th>
<th>Time</th>
<th>Learning Activities</th>
<th>Method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>10 mm</td>
<td>Trainee views the whole sequence</td>
<td>Videotape</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>Writes seat numbers on guest check</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>30 mm</td>
<td>Approach to the Customer</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>30 mm</td>
<td>Explain daily specials</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>Begin taking the order</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Trainer reviews marketing lesson</td>
<td>Videotape</td>
</tr>
<tr>
<td></td>
<td>15 mm</td>
<td>Help Customers select meal</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>15 mm</td>
<td>Answers Customer’s questions</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>Inform Customers of cooking times</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>Record selection</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>Accompanying items</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>Substitutions</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>One last check</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>10 mm</td>
<td>Collect menus</td>
<td>Role-play</td>
</tr>
<tr>
<td></td>
<td>20 mm</td>
<td>Turn food order into kitchen demo.</td>
<td>Practical</td>
</tr>
<tr>
<td></td>
<td>10 mm</td>
<td>Complete guest check with prices</td>
<td>Practical</td>
</tr>
</tbody>
</table>

Evaluation of learning

For a beginning employee without experience, the JUT (Job - Unit - Task) format allows the trainer to see how well the person is learning.
CHAPTER TEN / 7

THE CARIBBEAN HOSPITALITY TRAINER’S CERTIFICATE

CHA through its CHTI its training department offers two certificates for trainer in the Hospitality field: the work base or on the job Training certificate and the academic or group training certificate. The Work base certificate is suitable for Manager, Heads of Department and Supervisors working in the hospitality industry. The academic or group training certificate is for training specialists who wish to develop their skills in training hospitality employees.

SELECTION CRITERIA
Participants for both the work-base and academic should:
- Have a good educational background
- The ability to communicate well
- A personality suitable for training
- Be highly motivated
- Be dedicated to the job
- Have credibility in their place of employment
- Be experienced in their own field of expertise

OBJECTIVES
At the end of the course the participants will be able to:
- Describe the role and benefits of training
- Describe how training needs can be identified in the hospitality industry
- List the different methods of training
- Demonstrate effective on-the-job training skills, group training skills and coaching skills
- Demonstrate effective feedback and assessment skills

CARIBBEAN HOSPITALITY TRAIN THE TRAINER (CHTTT)

Work-base (On-the-Job) Trainer Seminar

The overall objective of the program is to increase the international competitiveness of the hospitality and tourism work force in the Caribbean by developing a regional credentialing system.

The Objective of the Caribbean Hospitality Train The Trainer Seminar is to develop in supervisors the skills to:
- Identify when a training need is present in his/her staff;
- Use the Standards as a training tool;
- Educate and train individuals to the standards established in the region;
- Evaluate if the performance is according to the standards trained;
- Reinforce performance when it is according to the standards;
- Correct the performance when it is below the standards.

Topics:
- Benefits of training
- Barriers to training
- Overcoming the barriers to training
- Qualities of a trainer
- How people learn
- The CTCP Region Standards
- Using the Standards in training
Recognising Training Opportunities
Evaluating performance
The Three parts of a training session
How to Analyse a Task
Question Technique
How to Deal with Answers
How to do Corrective Coaching

METHODOLOGY
The Seminar is highly participative.
Participants will run a training session and will be certified as On-the-Job Trainers.

DURATION
2½ days

THE CERTIFIED CARIBBEAN HOSPITALITY TRAINER (CCHT)
The overall objective of the Program is to increase the international competitiveness of the hospitality and tourism work force in the Caribbean by developing a regional credentialing system.

The aim of the Certified Caribbean Hospitality Trainer Seminar is to develop in instructors, tutors, educators and trainers the skills to manage and conduct group training. This course is also known as the academic or 5 day train the trainer.

OBJECTIVES
By the end of the program participants will be able to:
- Conduct a training needs analysis
- Plan and carry out successful training sessions to meet identified needs
- Evaluate the effectiveness of training

TOPICS
- The Role of Training in the organisation
- Training Needs Analysis
- Principles of Adult Learning: How Adults learn
- Methods and techniques for Group Training
- The Structure of a Group training session
- Preparing and using audio visuals
- Communication
- Question Techniques
- Group Dynamics: Handling Groups
- Evaluating Training

METHODOLOGY
The Seminar is highly participative. It includes a pre-seminar workbook to be completed prior to the start of the course. Methods will include: group exercises, lecturettes, discussions, activities, individual exercises. Participants will conduct a two mini training sessions and will be assessed to become certified as Hospitality Trainers.

DURATION
5 Days

GAINING THE QUALIFICATIONS
The qualification can be gained by attending a training course at various educational and training institutes throughout the Caribbean.

For further details please contact:
The Caribbean Hospitality Training Institute
1000 Ponce de Leon 6fl.
San Juan, PR 009, Phone (787) 725 9139
Fax: (787) 725 9108
www.caribbeanhotels.org
The hotel of today faces many challenges. High on the list is to have an efficient operation which will lead to cost saving. Proper management of the overall hotel environment not only offers the opportunity to save money but to demonstrate to guest and public that the hotel is environmentally conscious. In fact, for many tour operators and visitors this is an important factor in selecting a hotel.

The Caribbean Hotel Association, through CAST offers a number of services for the Small Hotels. Through collaboration with the Small Tourism Enterprise Project (STEP) a project of the OAS-USAID and Quality Tourism for the Caribbean, a number of support services are available to the Small Hotel that wants to get serious about environmental management.

One important starting point is an Environmental Walkthrough to identify areas of possible cost saving and steps to improve efficiency. In this module you will learn about the process of an Environmental Walkthrough.
ENVIRONMENTAL WALK-THROUGH: WHAT YOU NEED TO KNOW

Introduction

The “Environmental Walk-Through,” conducted by an experienced professional, is a great way to help hoteliers find ways to save water, energy, and materials and reduce operating costs. An Environmental Walk-Through takes half a day to complete and costs US$400, for a hotel with 75 rooms or less. It is designed to provide useful information and identify simple low-cost and high payback actions that go straight to the bottom line.

The Caribbean Alliance for Sustainable Tourism (CAST) provides the Environmental Walk-Through service with its cadre of trained local engineers and professional environmental management specialist. The OAS-USAID Small Tourism Enterprises Project (STEP) is also helping to introduce this service to small hoteliers in the Caribbean region. Completing an environmental walk-through will be a requirement for those properties wishing to join the Caribbean Experiences brand and marketing program being developed by STEP.

“This interaction was very very worthwhile. I am looking forward to the follow-up…..”
Larlkand M. Richards
GM, Bird Rock Beach Hotel, St. Kitts

“The extremely simple methods identified and other environmental and cost saving initiatives will definitely be a plus for a small property like Island Inn.”
Arthur Edmund
GM, Island Inn, Antigua

“The enthusiasm of the facilitator and the ideas obtained, will hopefully be our first step towards becoming a green property”
GM, Bianca Porter, Young Island Resort, St. Vincent

THE PROCESS

Step 1. Application & Scheduling

A small hotel owner or manager begins by completing the application form provided along with this toolkit. The form requests contact information, a property description and requires some basic information to gauge the hotel’s level of involvement in environmental programs. The completed form is faxed or sent electronically to CAST. Upon receipt, CAST will send a pre walk-through data collection form that requests utility (electric use, fuel purchases, water use) and room occupancy information from at least the past year of hotel operation (see

Small hotel environmental walk-throughs typically follow this four step process

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application and Scheduling</td>
<td>Conduct Walk-through</td>
<td>Discuss findings at closeout briefing</td>
<td>Post walk-through follow-up</td>
</tr>
</tbody>
</table>

Figure 1
Figure 1 for an example). The completed form will help you obtain the most out of this process and is required before the Environmental Walk-Through can be scheduled. The form is faxed or sent electronically to CAST, following which CAST will contact the property owner/manager to schedule the Environmental Walk-Through and advise on the cost.

Environmental Walk-Throughs are best scheduled for a time when hotel systems are up and running. You should make sure that your key staff is available to answer questions and participate in the post Environmental Walk-Through briefing. Arrangements may be made for the walk-through assessor to arrive the day before and spend the night getting to know the property better.

Step 2. Conducting the Environmental Walk-Through
For most small properties an environmental walk-through takes half a day to complete. The walk-through begins with an introductory meeting with the owner/manager and key staff. This is followed by the actual walk-through, where the assessor is accompanied by the owner/manager and appropriate staff to answer questions and act as guides. This is an opportunity for considerable learning by the owner/manager and/or key staff, since the assessor will have considerable experience in small property environmental management. The assessor is guided by a worksheet/checklist that has space for making notes and summarising key recommendations.

Figure 1. Example of completed water use & cost table for the Pre Walk-through Data Collection form.

<table>
<thead>
<tr>
<th>Month (year)</th>
<th>Total water consumption (Imperial Gallons)</th>
<th>Total cost (US$)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-January</td>
<td>1,717,594</td>
<td>10,871</td>
</tr>
<tr>
<td>1-February</td>
<td>2,006,020</td>
<td>8,868</td>
</tr>
<tr>
<td>1-March</td>
<td>1,168,003</td>
<td>12,681</td>
</tr>
<tr>
<td>1-April</td>
<td>845,896</td>
<td>13,182</td>
</tr>
<tr>
<td>1-May</td>
<td>610,919</td>
<td>13,747</td>
</tr>
<tr>
<td>1-June</td>
<td>951,122</td>
<td>12,521</td>
</tr>
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<td>1-July</td>
<td>410,249</td>
<td>11,383</td>
</tr>
<tr>
<td>1-August</td>
<td>949,236</td>
<td>11,042</td>
</tr>
<tr>
<td>1-September</td>
<td>914,047</td>
<td>8,062</td>
</tr>
<tr>
<td>1-October</td>
<td>856,000</td>
<td>11,042</td>
</tr>
<tr>
<td>1-November</td>
<td>777,124</td>
<td>10,598</td>
</tr>
<tr>
<td>1-December</td>
<td>665,143</td>
<td>10,109</td>
</tr>
</tbody>
</table>

Morning Walk-through Schedule
9:00 - 9:30 Introductory Meeting
Step 3. Discuss Walk-through Findings at an Owner/Manager and Staff Briefing

The post walk-through briefing should last no more than an hour (it may be organised around an informal lunch on the property). As many staff as possible should be invited to this briefing. This is an opportunity to increase staff awareness of environmental considerations, allow them to ask questions, and make them feel like they are part of the team needed to implement the desired changes. Hotel environmental assessments in the Caribbean region have shown that changing basic staff practices can have the greatest impacts on reducing operating costs and significantly improving environmental performance.

The objective of the briefing is to help management and staff decide on what they can do right away and easily, and motivate them towards immediate and appropriate follow-up action. Walk-throughs should
reveal a number of simple no-cost actions which can be readily implemented. The assessor may present a list of possible actions and help management decide on priorities.

Prior to leaving the property, the assessor would complete the walk-through worksheets, recording key findings and recommendations, and leave a copy with the owner/manager. The assessor would also leave copies of other appropriate supporting information and information on where and how to get additional advice and information.

**Example list of possible actions**

**Water**
1. Improve maintenance on the property’s toilets.
2. Install water-efficient (low-flow) showerheads and faucet aerators.
3. Install a pressure-reducing valve to reduce the property’s water pressure to 50 psi.

**Energy**
4. Weather-strip the guestrooms.
5. Turn off lights and air-conditioning units when not in use.
6. Insulate bare domestic hot water pipes.

**Solid Waste**
7. Discontinue the use of plastic bags for collecting yard waste and transporting laundry and linens.
8. Start a composting pile.

Figure 5. An example list of no-cost low-cost opportunities identified by a walkthrough.

**Step 4: Post Walk-through follow-up**

The environmental walk-through has been developed to serve as an affordable, relatively easy first step in helping small hotels improve their environmental performance. At the post walk-through briefing, follow-up options should be mentioned such as:

- Follow up technical assistance the STEP coaching system provided through its Walk-in Resource Centres
- A full environmental assessment (or a partial assessment directed at those environmental systems most in need of change as determined by the walk-through)
- Development of an EMS (Environmental Management System) for the property
- Environmental (“green”) certification for the property
- Participation in some of the upcoming training activities available through CAST, the Small Tourism Enterprises Project,

**Where Do I Get More Information and Assistance?**

**Contact CAST:**

The Caribbean Alliance for Sustainable Tourism (CAST) offers technical services (walk-throughs, environmental assessments), lists of products and services, as well as videos and publications. CAST is located in San Juan, Puerto Rico and may be contacted by phone (787) 725-9139, fax (787)-725-9108, e-mail: cast@caribbeanhotels.org, or visit their web site by clicking on the CAST link at www.-cha-cast.com. The following materials are available from CAST:
Environmental Technologies in Caribbean Hotels: Buying Specifications and Lessons of Experience

Case Studies: Water, Energy and Solid Waste Management in the Hotel Industry

Various publications from The Green Bookshelf

Environmental Management Toolkit for Caribbean Hoteliers

**Have an Environmental Walk-through Completed:**
To schedule an environmental walk-through (which will look at energy, water, solid waste and purchasing practices) contact your country STEP Coordinator or CAST.

**Visit Your Virtual Walk-in Resource Centre:**
The caribbeaninnkeeper website (www.caribbeaninnkeeper.com) is a virtual walk-in assistance centre, with copies of most of the materials available walk-in centres, as well as additional services.

**About the Small Hotels Toolkit Series**
This toolkit is one of a series of booklets designed to help small hoteliers improve their business operations, marketing and environmental performance. They are available in both printed and electronic format (STEP Resource Centre or www.caribbeaninnkeeper.com). Toolkits emphasise proven “best practices” appropriate to the Caribbean region, and include numerous case studies and real examples. Toolkits are supported by STEP Coordinators and experienced “coaches” to help hoteliers solve problems, implement desired actions, and secure additional expertise and information.

**About STEP**
The Small Tourism Enterprises Project (STEP) for the Caribbean provides support and assistance related to marketing, better business management, effective technology adoption, and improved environmental performance. Major funding comes from the Organisation of American States, the United States Agency for International Development, and the governments of participating Caribbean countries.

**STEP Walk-in Resource Centres**
Walk-in Resource Centres include publications, videos, and other materials related to small hotels and the environment. They also have a computer work station and internet access. Each centre has a trained STEP Coordinator to help you find what you need. STEP will also be making available experienced professionals to provide “coaching” assistance on a number of topics. Contact your STEP Coordinator for information on coaching currently available.
CHAPTER TWELVE

THE FUTURE
A GLIMPSE OF THE FUTURE THROUGH CHA’S EYES

Travel and tourism has become the world’s largest economic activity and is projected to triple in size and earnings by the year 2020. The Caribbean region as a whole is four times more dependent economically on the tourism sector than any other region of the world.

For most Caribbean islands, the future of the tourism industry is dependent on the private and public sectors co-existing in an amicable manner ensuring that all resources on hand are utilised to the fullest. If the industry is allowed to fail, then all sectors will feel the effects. The need has arisen for the two to combine their forces and help foster a more competitive image for the industry.

Hence, an effort must be made to implement refurbishing and modernizing programs, to ensure that a high level of professionalism is acquired and to maintain standards in accordance with that of our international competitors. Human resource training, workshops and seminars could be the forum in which these standards are introduced. Sensitizing members of the public on their role as citizens is also a necessity.

No longer can we sit idly and expect visitors to come to the Caribbean. Competition will intensify from our very source markets, USA and UK as they continue to promote domestic tourism and secure the viability, profitability and sustainability of their own tourism industry.

Consolidations, mergers and acquisitions will continue to accelerate in the future with our major trading partners, tour operators continuing the vertical integration, owning airlines, hotels, travel agencies and other distribution systems, competing with their suppliers of goods and services.

Unfortunately small properties in particular will face considerable challenges and the fall-out rate of unsuccessful hotels will increase. Small properties therefore must embrace all new technology especially the internet as online travel will continue to grow to phenomenal proportions and be the medium of choice for most consumers. They must re-orient and acquaint themselves with new business practices, participate in joint ventures, equity partnerships and possibly franchises.

The Caribbean market will be a very important source of business in the future for small tourism entities. This market has been relatively untapped and more resources must be invested in this market to increase market share.

A region wide approach to marketing must be continued into the future, to raise the profile of the Caribbean and generate demand for the region. Failure to find the necessary resources for the sustainability of the programme will have disastrous results for the region. Further, we must start acquainting ourselves with progressive business practices, and proven market strategies.

For the future, the success of Caribbean Tourism will not come easily. It will require dedication, hard work and selling a product which is worth selling.
All these Forms and your Employee Manual can be customised through CHTI. Just send a copy of the form with any modifications and CHTI will have its desktop publisher VersaType contact you.
## TERMINATION CHECK LIST

<table>
<thead>
<tr>
<th>Name</th>
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<table>
<thead>
<tr>
<th>Department</th>
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<tbody>
<tr>
<td></td>
<td>Human Resource Manager</td>
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<thead>
<tr>
<th>Administrative Assistant</th>
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<tbody>
<tr>
<td>Exit Interview</td>
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<tr>
<td>Resignation Letter (Voluntary termination)</td>
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<tr>
<td>P.A.F. (With Signatures)</td>
<td></td>
</tr>
<tr>
<td>Supporting Documentation (Communication (Notice) on involuntary terms)</td>
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</tr>
<tr>
<td>Benefits Terminated</td>
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<table>
<thead>
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### SAMPLE TOUR ORDER FORM

<table>
<thead>
<tr>
<th>Tour Order</th>
<th>Auditor's Coupon</th>
<th>4040:112:552:XXX</th>
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</table>

<table>
<thead>
<tr>
<th>Tour Name</th>
<th>Tour Number</th>
<th>Date of Issue</th>
<th>Basic Tour Cost</th>
<th>Date &amp; Place of Issue</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Tour Operator</th>
<th>Extra charges</th>
<th>Tax</th>
<th>Total</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Please Furnish Services Described To</th>
<th>Equip. Amt. Paid</th>
<th>Valid For 1 Year From Issue Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name : (Non Transferable)</th>
<th>Party of:</th>
<th>Currency/Exchange Rate</th>
<th>Conjunction Air Ticket(s)</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Address</th>
<th>Form of Payment</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Present To:</th>
<th>At: (City)</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>For:</th>
<th>At: (City)</th>
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</table>

<table>
<thead>
<tr>
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<th>At: (City)</th>
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</table>

<table>
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<tr>
<th>For:</th>
<th>At: (City)</th>
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<table>
<thead>
<tr>
<th>No. of Nights</th>
<th>Sgle. Dbl. Twin Other</th>
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<tbody>
<tr>
<td>Begin</td>
<td>Ends</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Arrival Flt/Date</th>
<th>Issued in Exchange for</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Departure Flt/Date</th>
<th>Date and Place of Original Issue</th>
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### SAMPLE MCO (MISCELLANEOUS CHARGES ORDER) FORM

<table>
<thead>
<tr>
<th>Type of Service for which issued</th>
<th>Date of Issue</th>
<th>Miscellaneous Charges Order-Auditor’s coupon</th>
<th>Airline form No: Serial No:</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>4010:341:806</td>
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<table>
<thead>
<tr>
<th>Amount in letters</th>
<th>Equal Amount Paid:</th>
<th>Date and Place of Issue</th>
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<table>
<thead>
<tr>
<th>For Value:</th>
<th>Coupon Value in Figures</th>
<th>Agent</th>
</tr>
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</table>

<table>
<thead>
<tr>
<th>To</th>
<th>At</th>
<th>Tax on MCD</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Reservation Data</th>
<th>Tax Value Currency</th>
<th>Issued in Conjunction with Form and Serial No:</th>
</tr>
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<table>
<thead>
<tr>
<th>Additional Remarks</th>
<th>Exchange Coupon to be Honored only for Value Shown Thereon</th>
<th>Form of Payment</th>
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</table>

<table>
<thead>
<tr>
<th>Name of Passenger</th>
<th>Non Transferable, Void if Mutilated or Altered, Valid for 1 yr</th>
<th>Endorsements</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Issued in Exchange For Form and Serial No:</th>
<th>4010:441:8062</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Date and Place of Original Issue</th>
<th>Chapter 3 Form 2</th>
</tr>
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</table>
# STOCK TAKING FORM

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td><strong>Opening Stock</strong></td>
<td>$</td>
</tr>
<tr>
<td><strong>Plus (+)</strong></td>
<td>Purchases $</td>
</tr>
<tr>
<td><strong>Minus (-)</strong></td>
<td>Closing Stock $</td>
</tr>
<tr>
<td><strong>Equals (=)</strong></td>
<td>Cost of Sales $</td>
</tr>
<tr>
<td><strong>Sales</strong></td>
<td>$</td>
</tr>
<tr>
<td><strong>Minus (-)</strong></td>
<td>Cost of Sales $</td>
</tr>
<tr>
<td><strong>Equals (=)</strong></td>
<td>Gross Profit $</td>
</tr>
<tr>
<td><strong>Gross Profit Percentage</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Cost of Sales x 100</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Sales</strong></td>
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## RESTAURANT BOOKINGS

<table>
<thead>
<tr>
<th>Name</th>
<th>Tel. No. Room No.</th>
<th>No. of Covers</th>
<th>Time</th>
<th>Special Requests</th>
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### TELEPHONE REFERENCE CHECK

<table>
<thead>
<tr>
<th>Applicant:</th>
<th>Position Applying For:</th>
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<tbody>
<tr>
<td>1 Employer:</td>
<td>Telephone Number:</td>
</tr>
<tr>
<td>Verified By:</td>
<td>Position:</td>
</tr>
<tr>
<td>Position Held:</td>
<td>Verified Yes No</td>
</tr>
<tr>
<td>From To</td>
<td>Yes No</td>
</tr>
<tr>
<td>Reason for Leaving:</td>
<td></td>
</tr>
<tr>
<td>Eligible for Rehire: Yes No</td>
<td>If No, Why?</td>
</tr>
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<tr>
<th>Performance</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Comments</th>
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<tr>
<td>Attendance</td>
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<td>Attitude</td>
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<tr>
<td>Grooming</td>
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<tr>
<td>Work habits</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Other Position(s) Held</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Other Job Comments</td>
<td></td>
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</tbody>
</table>

| 2 Employer: | Telephone Number: |
| Verified By: | Position: |
| Position Held: | Verified Yes No |
| From To | Yes No |
| Reason for Leaving: | |
| Eligible for Rehire?: Yes No | If No, Why? |

<table>
<thead>
<tr>
<th>Performance</th>
<th>Excellent</th>
<th>Good</th>
<th>Fair</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attendance</td>
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<td>Attitude</td>
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<td>Grooming</td>
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<td>Work habits</td>
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<td>Other Position(s) Held</td>
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<tr>
<td>Other Job Comments</td>
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</tbody>
</table>

Form CHTI 103/3
SAMPLE SIGHT-SEEING VOUCHER AND RESPONSIBILITY CLAUSE

GUESTS SURRENDERS TO LOCAL OPERATOR IN SIGHT-SEEING AND/ OR ENTERTAINMENT ARRANGEMENTS PURCHASED IN ADVANCE.

Arrangements

Please Provide □ 1 □ 2 □ 3 □ 4 Person(s) with:

ST. THOMAS ROUNDTRIP TRANSFERS WITH TRAVEL TOURS

Upon arrival in St. Thomas, please present this voucher to:
Tour Tours, Airport Counter, St. Thomas USVI. Tel: (809)744 1885

Gratuities not included (for one day-trip only) No refund value if unused

Package Trip Price Guarantee

Your Travel Agent guarantees that with the purchase of a TOURS, Inc. tour to Florida, the Bahamas or anywhere in the Caribbean, the price they pay is equal to, or less than the summation of published rack rates available to them at that time. Any client who can show satisfactorily that this statement is not true, will be refunded the savings he would have enjoyed.

SAMPLE TRANSFER AND HOTEL VOUCHER

TO BE SURRENDERED BY ARRIVING GUESTS IN EXCHANGE FOR SERVICES INDICATED. INCIDENTAL EXPENSES ARE NEVER INCLUDED AND SHOULD BE COLLECTED FROM DEPARTING GUESTS ON CHECK-OUT.

<table>
<thead>
<tr>
<th>HOTEL VOUCHER</th>
<th>CREDIT VOUCHER</th>
<th>COUPON No.</th>
<th>DATED ISSUED</th>
<th>INVOICE TO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Taxes and Gratuities not included</td>
<td>File No.</td>
<td>M/R</td>
<td>Please Provide:</td>
<td>Bill US Upon Departure</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Hotel Name &amp; Address</th>
<th>Nights @ $</th>
<th>Nights @ $</th>
<th>$</th>
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</table>

| IT No. | $ |
|-----------------
| Arrive VIA | $ |
| Depart | $ |
| Total | $ |

<table>
<thead>
<tr>
<th>No. of Nights Prepaid</th>
<th>Party of</th>
<th>Less Our</th>
<th>% Commission</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Room</th>
<th>Plan</th>
<th>Less Our</th>
<th>% Commission</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Agent Name</th>
<th>Net Value</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collect From Clients</td>
<td>Nights @</td>
<td>$</td>
</tr>
</tbody>
</table>

Special Instructions:
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<th>BEDROOM CHECK LIST</th>
<th>TICK OK</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lights, bulbs and shades</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Wiring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Draperies, hooks, rods etc</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Beds, turn mattress and check Underside/Underbeds clean and Clear</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Carpets, rugs and floorings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Closets, hangers, lights, laundry bags</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Windows-clean and working</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Screens-clean and in good repair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Ashtrays and matches/candles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Information sheets/booklets/room Rates/island information book</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Fire &amp; Emergency procedures posted</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Check all drawers</td>
<td></td>
<td></td>
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<tr>
<td>13. Comment Sheet/Stationery</td>
<td></td>
<td></td>
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<tr>
<td>14. Ice bucket or water pitcher/clean glasses</td>
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<td></td>
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<tr>
<td>15. Air-conditioning operative/clean filter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Ceiling for dust and cobwebs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Wall clean &amp; Pictures straight</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Minibar stocked (if Applicable)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Locks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. Telephone</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. Television</td>
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</tbody>
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**PORCH**

<table>
<thead>
<tr>
<th>PORCH</th>
<th>TICK OK</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>22. Clean and inspect porch - furniture clean and in good repair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23. Outside porch light clean &amp; working</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Sweep and mop floor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BATHROOM CHECK LIST</td>
<td>TICK OK</td>
<td>COMMENTS</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>---------</td>
<td>----------</td>
</tr>
<tr>
<td>1. Hot and cold water</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. All faucets and plumbing pipes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Toilets for leaks, clean bowl inside and out</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Clean toilet seat, underside &amp; bowl top</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Bath mat</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Shower curtain and hooks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Towels and all linens</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Soap</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Toilet tissues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Facial tissues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Waste paper basket</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Basket liner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Shoe shine rags</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Napkin bags</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Shelves under the sink</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Close Bathroom door to check cleanliness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Clean sink and bath drain, remove hair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Clean tub mat</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Clean shower head</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. Windows and screens</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. Pan/Vent, open and working</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Chapter 4 Form 2
<table>
<thead>
<tr>
<th>PUBLIC ROOM CHECK LIST</th>
<th>TICK OK</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Hot and Cold water</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Basins for cleanliness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Toilet bowls cleaned inside and out</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Toilet seats for cleanliness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Urinals for cleanliness</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Drainage</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. All taps</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Flooring</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Windows and screens</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Soap dispensers, towel racks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Hand towels</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Toilet tissues and racks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Facial tissues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Doors and ceilings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Lights</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Flush all toilets, ensure operational</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Locks</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Waste paper basket/ basket liner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Napkin bags</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Chapter 4 Form 3
CARIBBEAN HOSPITALITY TRAINING INSTITUTE
PERSONNEL ACTION FORM

Location Date

ALWAYS COMPLETE THIS SECTION

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First</th>
<th>Middle</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department</th>
<th>Number</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

NEW HIRE - REHIRE

New Hire
□ Rehire
□ Transfer
□ Recall

<table>
<thead>
<tr>
<th>Exempt</th>
<th>Base Rate</th>
<th>Job Code</th>
<th>Married</th>
<th>Income Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hr Wk</td>
<td></td>
<td>Single</td>
<td>Deductions</td>
</tr>
</tbody>
</table>

□ Non Exempt

<table>
<thead>
<tr>
<th>Date of Birth</th>
<th>Phone Number</th>
<th>Hire Date</th>
<th>Original Hire Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mo Day Yr</td>
<td>Mo Day Yr</td>
<td>Mo Day Yr</td>
<td></td>
</tr>
</tbody>
</table>

□ Male
□ Female

<table>
<thead>
<tr>
<th>Mo</th>
<th>Day</th>
<th>Yr</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Address</th>
<th>Street</th>
<th>P.O. Box</th>
<th>City</th>
<th>Country</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Work Status

□ Full Time
□ Part Time
□ Temporary
□ On call

<table>
<thead>
<tr>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mo</td>
<td>Day</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Area Code Number</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CHANGES (EXPLAIN)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Change</td>
</tr>
<tr>
<td>From</td>
</tr>
<tr>
<td>To</td>
</tr>
<tr>
<td>% rate Increase</td>
</tr>
<tr>
<td>Effective Date</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Rate</th>
<th>Base Rate</th>
<th>Base Rate</th>
<th>% rate Increase</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hr Wk</td>
<td>Hr Wk</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job</th>
<th>From Department/Position</th>
<th>To Department/Position</th>
<th>Job Code</th>
<th>Job Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Time</td>
</tr>
<tr>
<td>Part Time</td>
</tr>
<tr>
<td>Temporary</td>
</tr>
<tr>
<td>On Call</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Middle</td>
</tr>
<tr>
<td>Street</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>Country</td>
</tr>
<tr>
<td>Telephone</td>
</tr>
<tr>
<td>Marital Status</td>
</tr>
<tr>
<td>Married</td>
</tr>
<tr>
<td>Single</td>
</tr>
</tbody>
</table>

BENEFITS

| Insurance Effective Date: |
| Provider: |
| Single S+1 S+2 S+3 Family |
| Sick Leave |
| Bereavement |
| Personal |
| Jury Duty |
| Leave of Absence |
| Other |
| Number of Hours |
| Number of Days |
| Remaining Unit |

TERMINATION

<table>
<thead>
<tr>
<th>Termination</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voluntary</td>
</tr>
<tr>
<td>Involuntary</td>
</tr>
<tr>
<td>Employee resign. (Attached Resign. Letter)</td>
</tr>
<tr>
<td>Violation of Company Policy (Explain)</td>
</tr>
<tr>
<td>Excessive Tardiness/Absenteeism</td>
</tr>
<tr>
<td>Unsatisfactory Perform.</td>
</tr>
<tr>
<td>Health /Personal Reasons</td>
</tr>
<tr>
<td>Lay Off</td>
</tr>
<tr>
<td>Military Leave</td>
</tr>
<tr>
<td>Other (Explain)</td>
</tr>
<tr>
<td>Exit Interview</td>
</tr>
<tr>
<td>Yes</td>
</tr>
<tr>
<td>No</td>
</tr>
</tbody>
</table>

| Eligible for Rehire |
| Explain/Remarks/Instructions |
| Next Review Date |
| Perform only |
| Perform & Salary |

| Earned Vacation |
| Days | Hours |
|       |       |

| Accrued Vacation |
| Days | Hours |
|       |       |

| Other |
|       |

| Last Day Worked |
| Effective Date of termination |
| Final Check No. |
| Date |
| Employee Sig. |

| Approvals |
| Department Head |
| Date |
| Executive Director |
| Date |

| Form CHTI 103/4 |
|                 |
**CARIBBEAN HOSPITALITY TRAINING INSTITUTE**
**AN EQUAL OPPORTUNITY EMPLOYER**

<table>
<thead>
<tr>
<th>Name</th>
<th>Position Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>P.O. Box</td>
<td>Salary Desired</td>
</tr>
<tr>
<td>Street Address</td>
<td>Date available for work</td>
</tr>
<tr>
<td>City</td>
<td>Full Time Part Time</td>
</tr>
<tr>
<td>Country</td>
<td>List days and Hours Preferred</td>
</tr>
<tr>
<td>Phone-Home</td>
<td>Temporary If so, Specify period</td>
</tr>
<tr>
<td>Phone Work:</td>
<td>Are There Any Days or Shifts You Will Not Be Able to Work?</td>
</tr>
<tr>
<td>Previous Street Address</td>
<td>City</td>
</tr>
<tr>
<td>Age: Are you at least 18 years old?</td>
<td>State</td>
</tr>
<tr>
<td>Yes</td>
<td>ZIP</td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Are you at least 21 years old?</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

In order to permit a check of your work and education records should we be made aware of any change in name or assumed name that you previously used?  Yes No, If Yes, identify Name (s) and relevant dates

If you previously worked for CHTI state when and where and reason for leaving

**WORK EXPERIENCE**

List your previous experience during the last ten years beginning with you most recent position. If additional space is needed, attach a supplemental sheet.

<table>
<thead>
<tr>
<th>1 Employer</th>
<th>2 Employer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address (Street, City, Country)</td>
<td>Address (Street, City, Country)</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone</td>
</tr>
<tr>
<td>Starting Position</td>
<td>Starting Position</td>
</tr>
<tr>
<td>Starting Salary</td>
<td>Starting Salary</td>
</tr>
<tr>
<td>Last Position</td>
<td>Last Position</td>
</tr>
<tr>
<td>Final Salary</td>
<td>Final Salary</td>
</tr>
<tr>
<td>Dates Employed</td>
<td>Dates Employed</td>
</tr>
<tr>
<td>Immediate Supervisor</td>
<td>Immediate Supervisor</td>
</tr>
<tr>
<td>From</td>
<td>From</td>
</tr>
<tr>
<td>To</td>
<td>To</td>
</tr>
<tr>
<td>Duties</td>
<td>Duties</td>
</tr>
<tr>
<td>Reason for leaving</td>
<td>Reason for leaving</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3 Employer</th>
<th>4 Employer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address (Street, City, Country)</td>
<td>Address (Street, City, Country)</td>
</tr>
<tr>
<td>Phone</td>
<td>Phone</td>
</tr>
<tr>
<td>Starting Position</td>
<td>Starting Position</td>
</tr>
<tr>
<td>Starting Salary</td>
<td>Starting Salary</td>
</tr>
<tr>
<td>Last Position</td>
<td>Last Position</td>
</tr>
<tr>
<td>Final Salary</td>
<td>Final Salary</td>
</tr>
<tr>
<td>Dates Employed</td>
<td>Dates Employed</td>
</tr>
<tr>
<td>Immediate Supervisor</td>
<td>Immediate Supervisor</td>
</tr>
<tr>
<td>From</td>
<td>From</td>
</tr>
<tr>
<td>To</td>
<td>To</td>
</tr>
<tr>
<td>Duties</td>
<td>Duties</td>
</tr>
<tr>
<td>Reason for leaving</td>
<td>Reason for leaving</td>
</tr>
</tbody>
</table>

Please circle the name of any employer or supervisor who you do not want contacted at this time.
**EDUCATION AND TRAINING**

<table>
<thead>
<tr>
<th>School</th>
<th>Name, Street, Country Code for each school</th>
<th>Number of years completed</th>
<th>Graduated</th>
<th>Major</th>
</tr>
</thead>
<tbody>
<tr>
<td>High school</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>College</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Additional Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Which language other than English do you speak fluently?

If job related indicate the kind of work which you have done

- Typing (________ wpm)
- Word processing equipment (Types)
- Shorthand (________ wpm)
- Computers (Types)
- Other

**ADDITIONAL EMPLOYMENT HISTORY INQUIRIES**

Have you ever been dismissed or forced to resign from any employment?

- Yes
- No
  - if yes, please explain ________________________________

Except from vacations and holidays, how many days were you absent during the past twelve months?

- 0-6 days
- 6-12 days
- 12-2 days
- 21+ days

Comments: ____________________________________________________________________________________________

**EMPLOYMENT ELIGIBILITY VERIFICATION**

If employment is offered can you produce documentation which establishes your identity and employment eligibility?

- Yes
- No

**FELONY CONVICTION RECORD**

Have been convicted of a felony within the last 5 years?

- Yes
- No
  - If yes, state details and dates ________________________________

**EMERGENCY NOTIFICATION DESIGNATION**

Position to notify in case of emergency: ________________________________ Phone No. ____________________

Street address ________________________________ City ____________________ State & zip ________________

**REFERRAL SOURCE (CHECK ONE)**

- Walk-in applicant ________________________________ Community organization ________________________________
- Employment Agency ________________________________ Name ________________________________
- Name ________________________________ Employee Referral ________________________________
- School/ College ________________________________ Name ________________________________
- Name ________________________________ Newspaper Ad ________________________________
- Other ________________________________
REFERENCES
List formersupervisors not previously indicated or others with your work - do not include relatives

Name | Association/Years | Company / Address / Telephone
---|---|---


Number

APPLICANT’S STATEMENT
I hereby affirm that the information on this applicant ( and accompanying resume, if any) is true and complete to the best of my knowledge, I also agree that any falsified information or significant omissions may disqualify me from further consideration for employment and may be considered justification for dismissal if discovered at a later date.

I authorize a thorough investigation of my past employment and activities, agree to cooperate in such investigation, and release from all liability of responsibility all persons and corporations requesting or supplying information. I further authorize my physician or hospital to release any information which may be necessary to determine my ability to perform the job for which I am considered or any future job in the event that I am hired.

I hereby agree to submit to any lawful drug, polygraph, or pre-employment survey, integrity, or skills testing that may be required as a condition of employment or continued employment and understand that unless otherwise prohibited by law, refusal to submit to such testing during the course of my employment may result in disciplinary action, up to and including discharge. I further agree to submit to search of my person or any locker or work area that may be assigned to me, and I hereby waive all claim for damages on account6 of such examination.

I understand that my employment terminable at any time at the will of my employer, or myself, and this application is not, and is not intended to be, a contract for continued employment. If employed by CHTI will abide by its rules and regulations which subject to modification and amendment by CHTI.

Signature Date

Form CHTI 103/1
CARIBBEAN HOSPITALITY TRAINING INSTITUTE
INTERVIEW COMMENT AND DETERMINATION FORM

Name of applicant: (Last) (First) (M.I.)

Position Desired:

INITIAL SCREENING

<table>
<thead>
<tr>
<th>Grooming</th>
<th>Excellent-Good</th>
<th>Average-Fair</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to Self Express</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education or Training</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments
Interviewed by: 

REFERRAL

To Department

Position recommended for:

APPRaisal

<table>
<thead>
<tr>
<th>Grooming</th>
<th>Excellent-Good</th>
<th>Average-Fair</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ability to Self Express</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Education or Training</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments
Interviewed by: 

DETERMINATION

Recommend to hire for position stated
Hold Application - may be interested later
Rejected – Please explain in detail on reverse
Other – Please explain

Department Head: 

Please return completed form to Human Resources at completion of the Interview Process Form CHTI 103/2
CARIBBEAN HOSPITALITY TRAINING INSTITUTE
NEW HIRE FILES CHECKLIST

<table>
<thead>
<tr>
<th>Name of Applicant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Desired</td>
</tr>
</tbody>
</table>

**Human Resources Manager**

<table>
<thead>
<tr>
<th>Jon Designation</th>
</tr>
</thead>
<tbody>
<tr>
<td>P.A.F.</td>
</tr>
<tr>
<td>Application</td>
</tr>
</tbody>
</table>

**Administrative Assistant**

<table>
<thead>
<tr>
<th>Insurance Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acknowledgment of Handbook</td>
</tr>
<tr>
<td>Offer Letter (Exempt Only)</td>
</tr>
<tr>
<td>Reference Check Sheet</td>
</tr>
<tr>
<td>Orientation Complete</td>
</tr>
<tr>
<td>Ninety (90) Day Review</td>
</tr>
<tr>
<td>Benefits Log Sheet</td>
</tr>
<tr>
<td>Information entered in computer (If Applicable)</td>
</tr>
</tbody>
</table>

**Director:** ___________________________  **Date:** ___________________________

Please return completed form to Human Resources at completion of the interview process.
AN EQUAL OPPORTUNITY EMPLOYER

PERFORMANCE EVALUATION

<table>
<thead>
<tr>
<th>Employee’s Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title Grade</td>
<td>Department</td>
</tr>
<tr>
<td>Date of Hire</td>
<td>Date of This Evaluation</td>
</tr>
<tr>
<td>Evaluation Given by &amp; Title</td>
<td>Date of This Evaluation</td>
</tr>
</tbody>
</table>

INSTRUCTIONS

This form is designed to facilitate the performance evaluation. In preparing for performance evaluation, you should review the employee’s Job Description/Performance Standards, previous performance evaluation, employee’s actual performance on the job, and then evaluate the employee’s performance by completing this form.

In addition to completing this form, it is essential that you meet with the employee in order to openly discuss the employee’s performance in the areas being evaluated. You may ask the employee to self evaluate. Set sufficient time aside for dialogue.

Categories which are marked as warning, marginal, or competent must be addressed in the Development Plan section of the Performance Evaluation. A specific plan for improvement in the employee’s job performance, and/or plans for the employee’s career development or personal growth must be addressed.

Place the appropriate rating number in the box next to each factor which, based upon your observation and all pertinent information, best fits the performance of the employee in his/her present position. Evaluators are urged to use freely the “Comments” sections for comment descriptive of employee’s performance. If additional space is needed, please attach a separate sheet of paper.

PERFORMANCE RATING KEY

| Exceptional | Level of accomplishment goes well beyond reasonable but demanding standard, especially in key major areas of responsibility. Quality and quantity of output consistently outstanding. |
| Commendable | Clearly meets the requirement for position, Effectively performs in reliable and professional manner. |
| Competent | Does not always meet job requirement in all major areas of responsibility. Demonstrates ability to complete some assignments, but needs development and improvement. |
| Marginal | Performance noticeably below minimum job requirements, even with close supervision. Must significantly improve in a reasonable period to remain in position. |

Form CHTI 103/6
<table>
<thead>
<tr>
<th>PERFORMANCE RATING</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
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</thead>
<tbody>
<tr>
<td><strong>1. PERSONAL SKILLS</strong></td>
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</tr>
<tr>
<td>Completes job assignments to standard</td>
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<tr>
<td>a</td>
<td>Consistently</td>
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<tr>
<td>b</td>
<td>On time</td>
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<tr>
<td>Displays high personal ambition / drive / desire to achieve</td>
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<tr>
<td>Works well under pressure</td>
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<tr>
<td>Looks for better ways to do job to standard</td>
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<tr>
<td>Is mature and stable in approach toward unanticipated or unexpected problems</td>
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<tr>
<td>Seeks self-improvement and accepts criticism well</td>
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<tr>
<td>Upholds moral and corporate ethical standards</td>
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<tr>
<td>Meets grooming and professional attire standards</td>
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<tr>
<td>Learns new skills quickly</td>
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<tr>
<td>Adjusts quickly to company changes and growth</td>
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<tr>
<td><strong>2. WORK SKILLS</strong></td>
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<tr>
<td>Plans and organises work effectively</td>
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<tr>
<td>Delegates and does proper follow up</td>
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<tr>
<td>Participates in meetings</td>
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<tr>
<td>Maintains effective communication</td>
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<tr>
<td>Reports to work scheduled</td>
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<tr>
<td>Observes Rules and Procedures</td>
<td></td>
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<tr>
<td>Prepares and adheres to budget / forecasts</td>
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<tr>
<td>Is effective at cost control</td>
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<tr>
<td>a) Payroll</td>
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<tr>
<td>b) Purchasing</td>
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<tr>
<td>Properly maintains work area</td>
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<tr>
<td>Overall work quality</td>
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<tr>
<td>Overall work quantity (output)</td>
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<tr>
<td>Understands business objectives</td>
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<td>Written communication skills</td>
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<tr>
<td>Verbal communication skills</td>
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<tr>
<td>Does performance evaluations on time</td>
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<tr>
<td>Conducts Departmental New Hire</td>
<td></td>
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<tr>
<td>Orientation based on performance standard criteria</td>
<td></td>
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<tr>
<td><strong>SUB TOTAL</strong></td>
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</table>
### SECTION A

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<th>PERFORMANCE RATING</th>
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<th>1</th>
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</thead>
<tbody>
<tr>
<td><strong>3. Hospitality Knowledge &amp; Application</strong></td>
<td></td>
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<tr>
<td>As an employee, the following standards are to be established, exhibited and enforced by you:</td>
<td></td>
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<tr>
<td>Hospitality Zone</td>
<td></td>
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<tr>
<td>10 and 5 Rule</td>
<td></td>
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<tr>
<td>Speak First and Last</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Mission and Value Statements</td>
<td></td>
<td></td>
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<tr>
<td>Empowerment – Independent decisions that benefit the Customer</td>
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<tr>
<td>Actively participates in staff/departmental meetings.</td>
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</tbody>
</table>

#### 4. Job Performance

Knows and exemplifies Mission and Value Consistently
Role models both Technical and Hospitality Performance Standards

List 1 – 20 Job description

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19
20

**TOTAL**
### SECTION B
**ACHIEVEMENTS/RESULTS**

Attach copies of previous development plan from most recent performance evaluation and career planning management assessment session and describe results achieved or progress made to date:

<table>
<thead>
<tr>
<th>OBJECTIVE/GOAL</th>
<th>RESULT/ACHIEVEMENT/PROGRESS MADE TO DATE</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

### SECTION C
**DEVELOPMENT PLAN**

Based on this performance evaluation, identify specific needs for improvement in the employee’s job performance, and/or plans for the employee’s career development or personal growth. List what action has been agreed upon to be taken by both the employee and supervisor to bring about the desired performance or results. By whom and by when. Also, establish specific dates when progress will be reviewed (Review Dates). If additional space is needed, use additional sheets of paper.

<table>
<thead>
<tr>
<th>WHAT/HOW</th>
<th>REVIEW BY WHOM</th>
<th>BY WHEN</th>
<th>DATES</th>
<th>PTS</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
SECTION D
EVALUATOR’S OVERALL COMMENTS

<table>
<thead>
<tr>
<th>EXCEPTIONAL</th>
<th>COMMENDABLE</th>
<th>COMPETENT</th>
<th>MARGINAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>240-190</td>
<td>189-150</td>
<td>149-120</td>
<td>119 -</td>
</tr>
</tbody>
</table>

ASSESSEE’S OVERALL COMMENTS

NEXT REVIEW DATE

- [ ] Performance
- [ ] Performance & Salary

Employee’s Signature

- [ ] Date

Employer’s Signature

- [ ] Date

Director

- [ ] Department Head
# COMMUNICATION NOTICE

<table>
<thead>
<tr>
<th>Location</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>Employee</td>
<td>Department</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Position</td>
</tr>
<tr>
<td>Date of Hire</td>
<td>Today’s Date</td>
</tr>
<tr>
<td>Explanation of Incident (Use separate sheet if necessary)</td>
<td>Date of Incident</td>
</tr>
<tr>
<td>Employees Comments / Action Plan</td>
<td></td>
</tr>
<tr>
<td>Action Taken</td>
<td>Commendation</td>
</tr>
<tr>
<td>Verbal Warning</td>
<td></td>
</tr>
<tr>
<td>Written Warning</td>
<td>1st Warning</td>
</tr>
<tr>
<td>Suspension</td>
<td>Beginning</td>
</tr>
<tr>
<td>Returning</td>
<td>am/pm</td>
</tr>
<tr>
<td>Discharge</td>
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</tbody>
</table>

Notice to Employee: You have been given this notice in order that you may have the opportunity to correct the incident described above. If this incident is repeated or if you engage in any other rule infraction you will be subject to appropriate disciplinary action.

Employee’s Signature: _____________________________ Date: _____________________________

If Employee Refuses to Sign: "This is to certify that the employee named in this report was warned by his supervisor in my presence concerning the subject matter contained herein."

Witness’s Signature: _____________________________ Date: _____________________________

Executive Director’s Signature: _____________________________
To

From

Re Resignation

Date

Effective I Resign From My Position As

This Resignation is Strictly Voluntary

I Am Resigning Because

Signature

Date

Human Resources Representative
**SAMPLE REGISTRATION CARD**

Bell Captain

<table>
<thead>
<tr>
<th>Name (Print)</th>
<th>Persons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mailing Address</td>
<td></td>
</tr>
<tr>
<td>Home Address</td>
<td></td>
</tr>
<tr>
<td>City &amp; State</td>
<td>Zip</td>
</tr>
<tr>
<td>Check Out Time is 12 Noon</td>
<td>Departure Date:</td>
</tr>
</tbody>
</table>

Upon Checking Out my Account Will beHandled by:

- [ ] Cash
- [ ] AMEX
- [ ] VISA
- [ ] DINERS
- [ ] Carte Blanche
- [ ] Master Charge

Personal Cheque Charge Account

Signature

<table>
<thead>
<tr>
<th>Room</th>
<th>Rate</th>
<th>Clerk</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>

Check-Out Time Stamp | Check-In Time Stamp

- [ ] Information Rack Checked
- [ ] Telephone Rack Checked
- [ ] Clerk’s Initials
- [ ] Mail and Message Box Checked

Clerk’s Initials

**PETTY CASH VOUCHER**

Name: ___________________________ Date: ___________________________

Charge: No. ___________________________ Amount ___________________________

For ___________________________ Approved by: ___________________________

Received by: ___________________________
### STANDARDIZED RECIPE SHEET

<table>
<thead>
<tr>
<th>Item</th>
<th>Quantity</th>
<th>Cost</th>
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</thead>
<tbody>
<tr>
<td>1</td>
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</tbody>
</table>

**Total Cost**

**Sales Price**

**Food Cost Percentage (%)**

### Preparation Method

- 
- 
- 
- 

### Photo

Chapter 5 form 1
<table>
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<tr>
<th>Supplier</th>
<th>Item</th>
<th>Size</th>
<th>Order</th>
<th>Price</th>
<th>Total</th>
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Ordered by:

Authorised by:
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<tr>
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<th>Date</th>
<th>In</th>
<th>Out</th>
<th>Balance</th>
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### SAMPLE RECIPE FORM

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<th>Cost</th>
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<th>Cost</th>
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</table>

**Total Cost**

**Cost per Portion**

**Cooking Procedure**

---

Chapter 6 Form 1
## SAMPLE STOCK RECORD CARD

**Stock Description:**

<table>
<thead>
<tr>
<th>Stock Units</th>
<th>Minimum</th>
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<tbody>
<tr>
<td>Stock Ref. No.</td>
<td>Maximum</td>
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<tr>
<td>Location</td>
<td>Re Order Level</td>
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</tbody>
</table>

| Re Order Quantity |

<table>
<thead>
<tr>
<th>Date</th>
<th>Goods Received</th>
<th>Goods Issued</th>
<th>Balance</th>
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<tbody>
<tr>
<td></td>
<td>Reference</td>
<td>Quantity</td>
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Chapter 6 Form 2
# SAMPLE CASH RECEIPTS REPORT

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<th>Number</th>
<th>Denomination</th>
<th>Amount</th>
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<td>Coins</td>
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<tr>
<td>@</td>
<td>1c</td>
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Total Coin Amount $ 

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| @      | Other        | $      |

Total Currency $ 

Total Amount of Checks $ 

Add Cash Paid Out $ 

Total Cash $ 

Less Change $ 

Cash Received, Actual $ 

Cash Sales $ 

Amount Short or Over $ 

Chapter 6 Form 3
LATE/ABSENT REPORT

Employee ________________________________ Department ________________________________

Position ____________________ was due to report to work at ____________________________________________
______________________a.m./p.m. _________________________on date

TARDINESS

☐ Employee was late, but did report for work at   am/pm

☐ Notified Supervisor in advance that he/she would be late

☐ Did you notify supervisor in advance of tardiness

☐ Reason for tardiness

ABSENCE

☐ Employee failed to show for work or call

☐ Called in advance to notify supervisor of absence

☐ Called in, but not until _______________________am/pm

☐ Requested time off from ______________________ to __________________

(if time off requested is more than five working days, a Leave of Absence must be applied for.)

Reason given for absence and number of days to be off, if known ____________________________________________
___________________________________________________________________________________________________

ACTION TAKEN BY SUPERVISOR:_____________________________________________________________________
___________________________________________________________________________________________________

Supervisor’s signature _______________________________ Date ___________________________

Note: This form to be completed by Supervisor for every incident of tardiness or absence regardless of reason. For absence which requires payment, a Personnel Action Form (PAF) must be also completed. This form also accompany any written communication Notice given for excessive absenteeism or tardiness.

Form CHTI 103/6a
GLOSSARY
Glossary

A la carte - A meal with each item priced separately on the menu

A/V - Audiovisual Equipment

AA - American Airlines

AAA - American Automobile Association

AARP - American Association of Retired Persons

ABC Island - The nickname for the islands of Aruba, Bonaire and Curacao.

ABTA - Association of British Travel Agents or Association of Bank Travel Agents.

ABTB - Association of Bank Travel Bureaus

Access code - A combination of characters that will enable the user of a computer to gain entry to a field of information

ACCI - Associated Cultural Clubs, Inc

ACTS - Airlines Computerised Baggage Tracing System

AEA - Association of European Airlines

Affiliated Hotel - One of a chain, franchise, or referral system; membership in which provides special advantages, particularly a national reservation system

AH&LA - American Hotel & Lodging Association

AITO - Association of Incentive Travel Organisations

All Expense Tour - A tour offering all or most services.

All -inclusive - The price includes the features specified (usually air fare, hotel, all meals, drinks and activities)

Allied Members - Suppliers of goods and services who are members of the Caribbean Hotel Association

ALPA - Airline Pilots Association

Amadeus - A computer system founded by Air France, Iberia, Lufthansa and SAS Airlines

Amenities - Extra complimentary items available in hotel room. Examples: Toiletries, gifts, fruit baskets, etc.

American Plan or AP - Meal plan which includes three meals daily with the hotel room price, also called Full Pension.

AMEX or AMEXCO - American Express Company

Apollo - The computer system sponsored by United Airlines/ Covia Corporation

Archipelago - A group of many islands

ARTA - Association of Retail Travel Agents

ASAE - American Society of Association Executives

ASTA - American Society of Travel Agents

ATA - Air Transport Association of America. The trade association of the U.S. and Canadian (as associate members) scheduled airlines including international, trunk local service, inter Hawaiian and inter-Alaskan, helicopter and cargo carriers. Its headquarters are in Washington DC

ATARS - Automated Travel Agents Reservation System

ATC - Air Traffic Conference

ATLB - Air Transport Licensing Board

ATME - Association of Travel Marketing Executives

Back of the House - Areas for staff use only and not accessible to a Customer.
**Back-to-back** - Describes a program of multiple air charters between two or more points with arrivals and departures coordinated to eliminate aircraft deadheading and waiting. In other words, when one group is delivered to a destination another to ready to depart from that point

**Backup** - Create a copy of an original disk

**Banquet** - A food function for a group

**Bar Back** - An staff who assists the bartender in pre-prep stocking and cleaning the bar area

**Bareboat Charter** - A yacht, boat or other vessel rented without supplies fares is not permitted

**Blackout dates** - Certain dates, usually holidays, when travel on specific fares is not permitted

**BP** - Bermuda Plan- breakfast only

**Breakfast** - Coffee and Danish

**BTA** - British Tourist Authority, formerly British Travel Association

**Buffet** - A meal presented in such a way that guest may serve him/herself

**Business** - Affiliation (an F.I.T. guest)

**BVI** - British Virgin Islands

**BWIA** - International (Formerly British West Indian Airways)

**CAIC** - Caribbean Association of Industry and Commerce

**Captain** - A Department Head, staff in the F&B department

**Caribbean Sea** - The sea between the Lesser Antilles and Cebtral and South America

**CARICOM** - Caribbean Community, an economic grouping of British Common wealth Caribbean countries, formed in 1973

**Carnival** - Originally, the season immediately preceding Lent, and observed with merrymaking and parties

**Cash Bar** - A bar set up in a private room where customers pay for drinks.

**Cay** - A small, low island sometimes spelled “key” or “caye”

**CBI** - Caribbean Basin Initiative

**CGOT** - Canadian Government Office of Tourism

**CHA** - Caribbean Hotel Association; or professional title, Certified Hotel Administrator, an AH&MA award


**CHAC** - Caribbean Hospitality Advisory Council; a committee of CHTI

**CHARMS** - Caribbean Hotel Association Reservation And Management System

**Check-in** - Registration of a guest for room and services rendered while a hotel guest

**Chef** - Food preparation specialist who has complete authority of design and preparation of menus and food production

**CHIC** - Caribbean Hospitality Industry Conference, the annual convention sponsored by CHA

**CHOCHS** - Council of Heads Of Caribbean Hotel Schools

**CSME** - Caribbean Single Market and Economy

**CHRIE** - Council of Hotel Restaurant and Institutional Education

**CHTI** - Caribbean Hospitality Training Institute, the training arm of CHA

**Concierge** - The individual or desk at the hotel which attends to the guest’ entertainment and needs

**Continental Breakfast** - A small morning meal that usually includes a beverage, rolls, butter and preserves
Continental Plan or BP – A meal plan that includes continental breakfast with the price of accommodations
Corkage – A charge made by the establishment for opening and serving bottles of wine or other liquor not purchased there
COTAL – Confederation of Latin American Tourists Organisation
Covers – The number of servings at a banquet function or restaurant outlet
CP – Continental Plan. A hotel rate that includes bed and continental breakfast
CPC – Caribbean Publishing Company, publisher of the Gold Book, Gold Cards and this hand book
CRS – Central Reservation System – a computerised system offering direct access to airlines, hotels and other supplies for reservations and, in many cases, ticketing
CSHAE – Caribbean Society of Hotel Association Executives
CTC – Certified Travel Council
CTO – Caribbean Tourism Organisation
CTOA – Creative Tour Operators Association of America
Cuisine – A particular style or manner of preparing or cooking food
Data based – Integrated files or data used for processing applications, in contrast with individual data files
DeltaStar – The computer system sponsored by Delta Airlines
Demi-pension – A hotel rate including bed, breakfast and either lunch or dinner (same as the Modified American Plan.)
Destination – In the travel industry, any city, area, or country that can be marketed as a signal entity to tourists
Dine-around plan - Plan where guests can choose from a number of establishments for their dining.
Double – Loosely, any hotel room for two persons, more specifically it is a room with a double bed. A room with two smaller beds is a twin
Double Bedroom – A bedroom suite
Double Occupancy Rate – The per person for a room to bed shared with another person. This is the rate most frequently quoted in tour brochures
Double Room Rate – the full price of a room for two
DSM – District Sales Manager
ECAC – European Civil Aviation Conference
Economy – These individual fares are applicable in the Economy sections of aircrafts
Ecotourism – Travel that focuses on nature, the preservation of the environment and a controlled management of resources
EU – European Union
EP – European Plan. A hotel rate that includes bed only. Any meals are extra
ETC – European Travel Commission
Excursion Fare – These individual round-trip, conditioned by minimum/maximum stay limits, usual limits stay limits, usual limits range from 7-14-21 days.
Extension – A trip to be taken before, during or at the conclusion of a basic tour for which all reservations and arrangement can be made, usually optional for members of a tour group at additional costs
F&B – Food and Beverage
F.I.T. – Frequent Individual Traveller
Familiarization Tour – An educational program generally for agents or airline personnel, to a destination for inspection of tourist
facilities. Usually sponsored in cooperation with airlines, tour operators and local tourist boards

**Fire Brigade** – A group of staff who are trained to respond to hotel fires 24 hours a day

**Force Majeure** – an event that cannot be anticipated by the tour operator, cruise line, airline, etc.

**French service** – Style of service where-by the items are served at the table rather, than a prepared plate coming from the kitchen.

**Front Desk** – Area in which the customer checks in and checks out of the hotel

**Front of The House** – Guest areas

**Full House** – When all hotel rooms are occupied by guests

**Function** – A guest group activity that takes place in a hotel function room

**G.S.A.** – Guest Service Agent. The staff that works at the front desk

**Garde Manger** – In charge of cold meats, fish, decorative presentations of appetizers, buffets and sandwiches

**Gemini** – A computer system formed by the merger of the Air Canada and Canadian Airlines International reservation systems

**Gold Book** – The Caribbean Travel Directory published twice annually by CHA and CPC

**Greater Antilles** – The arc-like area of islands in the Caribbean including Cuba, Jamaica, Puerto Rico and Hispaniola

**Hospitality** – The gracious welcoming and serving of guests

**House Phones** – Phones available for guests to use to place calls within the hotels

**HSMAI** – Hotel Sales and Marketing Association International

**IAT** – Independent Air Tour

**IATA** – International Air Transports Association

**IAWT** – International Association for World Tourism

**ICTA** – Institute of Certified Travel Agents

**IFAPA** – Internation Federation of Airline Pilots Association

**IFTTA** – Internation Forum of Travel and Tourism Advocates

**IHA** – International Hotel Association

**IIT** – Individual Inclusive Tours. IIT fares require passengers to purchase a minimum land package

**IST** – Individual Tour

**ITC** – Inclusive Tour Charter. The charter of an entire aircraft by a tour operator or travel agent for persons travelling on inclusive tours.

**ITOA** – International Tour Operators Association replacing ACTO

**IUOTO** – International union of Official Travel Organisations

**JTO** – Joint Tour Operators

**Leeward Islands** – The islands of the Caribbean which include Antigua, Barbados, Anguilla, Guadelope, Montserrat, St. Kitts and Nevis, St. Martin/St. Maarten

**Lesser Antilles** – the lower arc-like area of islands in the Caribbean exceeded from the Virgin Islands to the coast to South America

**M.O.D.** – Manager On Duty

**Maitre d’** – a department head responsible for the efficient and enjoyable experience in a dining room setting
MAP – Modified American Plan. A hotel room rate including breakfast and either lunch or dinner.

MARS plus – Multi-access Reservation System

MCO – Miscellaneous Charges Order. An airline voucher

Minimum Land Package – The minimum tour, expressed in terms of cost and ingredients

Modem – An electronic device which converts digital data from a computer terminal into electrical impulses which can be transmitted over telephone lines

Modified American Plan or MAP – Meal plan that includes two meals daily (usually breakfast and dinner) with the price of accommodations, sometimes half pension

Multi-access System – A computerised reservation system which has direct access to the computers of several airlines and or travel suppliers

NACA – National Air Carriers Association

NATO – National Association of Travel Organisations

NBTA - National Business Travel Association

OAG - Official Airline Guide

OECS - Organization of Eastern Caribbean States

OHRG - Official Hotel And Resort Guide

P.B.X. - Private board exchange (telephone department)

Papiamento - A Spanish-based Creole language, spoken in Aruba, Bonaire, and Curacao

PARS - The computer system sponsored by TWA

PATA - Specific Asia Travel Association

Patois - A dialect of French spoken on former French possession

Peak Season - The busiest period in a hotel’s business calendar.

Posada - A small hotel in Spanish speaking countries

Pre-registration - The customer is pre-assigned to a room by the hotel to be available upon the customer(s) arrival

Purveyor - A firm which provides or supplies merchandise to customer firm

Queen Mary - A multi-level rolling cart used for transporting F&B equipment

Rack Rate - The current rate charged for each accommodation as established by the property manager

ROM - Read Only Memory. Computer memory that cannot be rewritten

Room Block - Predetermined number of rooms for group rooms normally

S.O.P. - Standard Operation Procedures

SABRE - The computer system sponsored by America Airlines

Safe deposit box - Located in the Front Office for use as security storage of personal items

SATA - South American Tourism Association

SOATW - Society of American Travel Writers

Shoulder Season - Between a high and low season of a fair or traffic season

SKA L - A social organisation of Travel industry executives

SMURF - Social, Military, Union, Religious and Fraternity Groups

Sommelier - A wine steward
Sous Chef - A assistant to the chef

Spa - Originally named for a city in Belgium, a resort which features mineral springs at present, a health oriented resort

Steward - An individual that is in charge of sanitation and organisation of the F&B areas.

Table d'hote - Literally, "table of the host; as a meal plan on tours it means a limited choice of entrees that are normally pre-arranged.

TIAA - Travel Industry Association of America

TICA - Travel Association of Canada

Tour - An inclusive occasion that offers many included services for the stated price. It probably includes most of the following: transportation, lodging, meals, sight-seeing, taxes, tips and extras.

Trade Winds - The winds prevailing over the oceans for about 30° north latitude to about 30° south latitude. They blow from the north east to the south west in the northern hemisphere, and from the south east to the north west in the southern hemisphere.

Turn-Around - The rapid arranging or re-arranging of a facility to prepare for its next function.

Turndown Service - A service provide by Housekeeping in which a room is refreshed and the bed lining turned down for the evening. This usually occurs while the guest is at dinner.

Upscale - That which caters to a more sophisticated or wealthier market group.

USTTA - United States Travel & Tourism Administration

V.I.P. - Very Important Person

Value Season - The season when rates are lower, the opposite of peak season.

VAT - Value Added Tax.

Wake-up Calls - Service provided by P.B.X.

Walk-in - A customer who checks into the hotel without a reservation.

Walk-in Refrigerator - A commercial refrigerator large enough to walk into.

WATS - Wide Area Telephone Service.

West Indies - A collective name for the British Common Wealth group of islands situated in the Caribbean Sea between North and South America.

Windward Islands - The islands in the Caribbean which include Dominica, Grenada, St. Lucia, Martinique and St. Vincent.

WTO - World Tourism Organisation

WTTC - World Travel & Tourism Council.

Yield Management - Pricing according to the return or expected revenue on a seat, a room or other accommodations.
WE VALUE YOUR COMMENTS

Dear Guest,

We would be grateful if you could spend a few minutes of your time to complete their questionnaire. Your comments will assist us to improve our service.

How do you rate the following - please circle your rating.

A = Excellent, B = Good, C = Satisfactory, D = Poor

Menu choice

Choice of wines and beverages

Decor/atmosphere of the restaurant/bar

Greeting received

Speed of service

Efficiency of the staff

Friendliness of the staff

Quality of the food

Temperature of the food

Presentation of the food

Further Comments

Thank you for your time in completing this questionnaire - your views are most appreciated. We look forward to seeing you again soon.

..........................