

## **A Regional Research Initiative**

Identification of Critical Position and Skill Gaps for:

Financial/Insurance/Banking

Construction/Manufacturing

Tourism/Hospitality



May 14, 2013

### Preface

*Workforce Now* is a regional research initiative to identify current and future talent requirements for the five counties of Southwest Florida. The initiative was created in October 2012 as an outcome of the Education Summits produced by The News-Press Media Group. It is envisioned as a systematic, strategic multi-year focus on understanding and meeting critical workforce needs. This report is a summary of the information gained from a 17-question survey and panel discussion for three business sectors in Southwest Florida. These include the financial/insurance/banking sector, construction/manufacturing, and tourism/hospitality.

A special thank you goes to the companies and individuals for helping the research group develop and test the current Workforce Now methodology. Each panel told its story of workforce gaps and needs today and what it forecasts for the next five years at a Workforce Now Forum held on March 19, 2013. The views and any errors are those of the authors and not of the institutions or companies that supported or participated in the Workforce Now project.

These two initial studies will set the stage for future research. The next steps include interviews with selected educational leaders, an internet survey of educators, and an overall workforce assessment study during the summer of 2013. The plan is to identify business sectors or occupations to be studied each year to provide current and representative information on employment gaps, skill needs, and desired employee characteristics.

A special thanks to Mei-Mei Chan, President and Publisher of the News-Press Media Group, for leading the effort and to Florida Gulf Coast University, Edison State College, and Hodges University for providing the research leadership and staff time to complete these initial Workforce Now reports. This experience will help set the stage for a more robust research effort by industry and sector.

This project and report would not be possible without the generous support of the founding Workforce Now investors:

- The News-Press Media Group
- Partnership for Collier's Future Economy
- The Lee County Industrial Development Authority
- The Southwest Florida Workforce Development Board
- Arthrex, Inc.
- Busey Bank
- Chico's FAS, Inc.
- Manhattan Construction

## Workforce Now Forum II

---

Florida Gulf Coast University  
Edison State College  
Hodges University

For more information on this initiative, contact Mei-Mei Chan, President and Publisher, News-Press Media Group at [mmchan@news-press.com](mailto:mmchan@news-press.com) or 239 335-0277 or Gary Jackson, Director, Regional Economic Research Institute, Florida Gulf Coast University at [gjackson@fgcu.edu](mailto:gjackson@fgcu.edu) or 239 590-7319.

*Gary Jackson*

*John Meyer*

*Aysegul Timur*

Dr. Gary Jackson  
Director  
Regional Economic Research  
Institute  
Lutgert College of Business  
Florida Gulf Coast University

Dr. John Meyer  
Dean  
School of Business and  
Technology  
Edison State College

Dr. Aysegul Timur  
Program Chair  
Business Administration &  
Public Administration  
Johnson School of Business  
Hodges University

# Workforce Now Forum II

---

## Table of Contents

Preface-----	2
Executive Summary-----	5
Methodology-----	9
Study Findings – Finance/Insurance/Banking-----	10
Study Findings – Construction/Manufacturing-----	16
Study Findings – Tourism/Hospitality -----	25
Conclusion/Summary-----	32
Appendix A: Interview Guide -----	34
Appendix B: Detailed Position/Job Descriptions -----	36

# Executive Summary

This study looked at three key business sectors including finance/insurance/banking, construction/manufacturing, and tourism/hospitality. Thirteen firms volunteered their time to assist the research team in identifying their workforce gaps and skill requirements.

The common themes were that regulation and technology are changing the way companies do business and requiring workers to acquire new skills and knowledge to be competitive in the workplace. Information technology applications are becoming much more common, combining old world craftsmanship with 21<sup>st</sup> century technology. All the employers indicated a need for continuous learning and good written and oral communication skills, basic computer and business mathematics skills, critical thinking, problem solving, and teamwork.

The key findings for the Finance/Insurance/Banking business sector are that technology has changed the way customers interface with the bank, including PC-based and mobile-device activity. This business sector is under increased government regulation, the tax codes are changing, and the housing industry remains in recovery. The study found few employment gaps at the present time but there is increasing demand for compliance and regulatory professionals due to the increasing regulatory requirements. Another growth area is for information technology positions including social media, as well as computer engineering. Some positions, such as financial planners and insurance advisors, are more entrepreneurial, so the incumbent must be self-reliant and a self-starter. Current downsizing and realignments have limited the number of individuals training for this business sector.

The necessary skills to be successful in the finance/insurance/banking business sector include:

1. Ability to complete business or personal financial analysis.
2. Ability to make decisions.
3. Accurate written and oral communication skills.
4. Comprehensive knowledge of finance and accounting rules and principles.
5. Critical thinking.
6. Ethical.
7. Persuasiveness.
8. Time management.
9. Working knowledge of tax laws.

## Workforce Now Forum II

---

The key findings for the Construction/Manufacturing business sector are that new information technology is increasingly important, including the use of PCs and smart devices to communicate, schedule, manage, order, look up specifications, and track projects. Computerized machines such as robotic and CNC machines are becoming more widely used across various manufacturing businesses. Sustainable construction practices are requiring changes in design. The companies want “old world craftsmanship” with 21<sup>st</sup> century technologies.

Building Integrated Modeling (BIM) software knowledge and experience are becoming more important. Companies need employees who can move from Computer-Aided Drafting (CAD) design to Computer-Aided Manufacturing (CAM). The expected trend is to more sophisticated computerized controls for buildings that will require advanced technical computer skills installation and service personnel. There is a concern among the construction executives about a potential shortage of skilled trade workers, such as plumbers and carpenters, when housing construction activity returns to more normal levels.

The hard-to-fill or critical positions for construction/manufacturing identified by the executives included:

1. Drafter/engineer in cabinet construction and installation and technically competent in AutoCAD, Microsoft Windows, Office, and Adobe.
2. Certified welders for piping systems.
3. Service and control technicians with basic principles of refrigeration, hydronic pumping, air distribution, centrifugal refrigeration, and boiler systems and digital controls.
4. CAD designers with basic knowledge of architectural, structural electrical, plumbing, and mechanical systems.
5. Engineers and computer-aided manufacturing (CAM) positions that can use Unigraphics or similar software.
6. CNC 5-axis Mill Operators who are able to combine PC skills with production skills.
7. Sales engineers with strong technical skills in HVAC and energy systems matched with sales and presentation skills.
8. Production supervisors who are able to manage people, read CAD drawings, and are experienced in construction and manufacturing.
9. Controller or other high-level positions, which have experience in manufacturing and an MBA degree or equivalent.

## Workforce Now Forum II

---

Independent of the position, the construction/manufacturing group indicated that employees need stronger skills in:

1. Ability to read 2D or 3D CAD.
2. CNC education.
3. Critical thinking.
4. Engineering.
5. Hand tool skills including the use of tape measures.
6. Mathematics.
7. Problem solving.
8. Work ready skills.
9. Wood shop or carpentry.
10. Written and verbal communication skills.

The key findings for the Tourism/Hospitality business sector are communication technology including websites and applications for social media are changing the way that customers and companies communicate. There is concern that costs might rise due to healthcare and immigration legislation and other regulations. Many of the jobs are entry-level that are taken to gain experience and to provide income support while pursuing an education or another career. Many of the resorts fill management positions and a college degree is preferred. Hard-to-fill or critical positions identified by the Tourism/Hospitality companies included the following:

1. Entry-level employees including room attendants, food servers, guest service agents.
2. Front-House staff including hosts/hostesses and food servers.
3. Back-House staff including cooks and food preparation.
4. Graphic artists.
5. Boat Captains with U.S. Coast Guard Certificates.
6. Marketing staff.
7. Mid-level managers who directly supervise the front-office employees and manage guest experience.
8. Management responsibilities include customer safety, fiscal or budget knowledge, oversight of mid-level managers, training, guest experience, food quality, ads and promotions, and employee scheduling.

Independent of the position, the tourism/hospitality group of employers indicated that employees need stronger skills in:

1. Ability to organize work and delegate tasks.
2. Ability to read social clues.
3. Communication skills.

## Workforce Now Forum II

---

4. Conflict resolution.
5. Creative thinking.
6. Money mathematics.
7. Problem solving.
8. Reading and understanding financial data and statements.



# Methodology

The overall objective of the Workforce Now initiative is to provide a better flow of information from business to educators concerning the types of positions, skills, and candidate characteristics that are needed now and projected to be needed in five years. The hope is to develop a continuous process that provides an information flow by selecting certain industries and sectors for further study over time. This study is designed to provide experience and test the current methodology for surveying and capturing key information on employment gaps, skills, and characteristics in Southwest Florida.

Three of the key business sectors in the Southwest Florida area were chosen for the second design study. These included companies in finance/insurance/banking, construction/manufacturing, and tourism/hospitality. A survey guide was developed with three major sections and 17 questions. The three major parts of the guide included an overview of the industry, an overview of the company or organization, and information on critical employment gaps in Southwest Florida. Three executives were selected to provide information on the finance/insurance/banking business sector. Five executives were selected to provide workforce information for the construction/manufacturing and the five additional executives provided information on the tourism/hospitality business sector.

Each executive was asked to complete the study/interview guide questions and provide copies of its critical employment gaps or positions that it is having trouble filling. A team of three researchers representing Florida Gulf Coast University, Edison State College, and Hodges University worked with the companies to discuss and help identify the gaps, skills, and characteristics in February and March 2013. In addition, the research team moderated the March 19, 2013, Workforce Now Forum held at Edison State College. Finally, all the information was integrated into this research summary report to be made available to the educational community and the general public.

## **Workforce Now Study Findings Financial/Insurance/Banking Sector**

### **Sector Overview**

The banking and financial services industry is comprised of commercial banks, credit unions, Savings and Loans Associations, brokerage firms, private wealth management firms, financial planners, insurance companies, mortgage bankers, and non-bank entities such as check cashing agencies and payday loan establishments. Adjunct to the industry are related service providers such as attorneys, Certified Public Accountants, and a variety of hybrid service companies.

Services provided by the industry to the public include the maintenance, management, and servicing of transaction accounts (such as checking accounts), savings accounts, loans, mortgages, annuities, investments, brokerage services, business banking and cash management, asset management, and wealth management. Insurance products include life, health, homeowners, renters, automobile, personal liability, and long-term care policies along with annuities, financial planning, retirement planning, asset management, wealth accumulation, risk management, estate planning, and capital preservation products and services.

The industry is dominated by the large national and regional bank and insurance companies, but smaller local firms, sole proprietors, and independent contractors have carved out a significant share of the market.

Since the inception of the financial crisis, the local banking industry has been hit especially hard. In 2007, a total of 28 banks, with some \$12 billion in deposits, failed. Bank failures have occurred every year since, though the rate has slowed dramatically with a total of 8 banks with a relatively modest \$2.25 billion in deposits failing in 2012. The financial crisis has also led to marked reductions in interest rates, giving some savers the incentive to look beyond traditional savings vehicles for a better return. The dichotomy is, that at the same time, investors and savers are increasingly concerned about capital preservation, which has the effect of attracting capital to those products viewed as safe, including insurance-based products and annuities.

In addition, technology is significantly impacting the way much of the industry conducts business, and has gone well beyond traditional ATMs. It has permeated most aspects of the industry including allowing customers to make day-to-day transactions via PC and smart phone; invest, place trades, and move money online; and accept credit card payments using mobile devices. Among the effects of this trend are the reduced need

## Workforce Now Forum II

---

for expansive and expensive branch or agency offices and the increased use of kiosk centers, call centers, and other non-traditional outlets for products and services, including direct sales.

Lastly, the entire industry has suffered other less tangible effects of the financial crisis. These include increased government regulation, tax code changes (particularly those that impact retirement savings and intergenerational wealth transfer), business and household deleveraging, business and consumer pessimism, and a stubbornly tight mortgage market. Though the worst of the financial crisis may be over and the economy may be healing (or has healed), many households and individuals still carry significant financial baggage such as underwater mortgages, high student loan debt, bankruptcies, and foreclosures from the past several years that potentially inhibit their full participation in the industry today. For their part, national governments have also contributed to a broad uncertainty in the financial services arena by embarking on economic policies to prevent the collapse of the Euro and engaging in monetary policies designed to weaken currencies such as the US Dollar, the Chinese Yuan Renminbi, and the Japanese Yen to help stimulate economic output. The health of the financial services industry will continue to be a reflection of national and regional economic activity.

## Company Overviews

The Workforce Now initiative recruited three executives from local financial services companies who generously contributed their time and expertise by completing a survey and participating in the Workforce Now Immersion Forum on March 19, 2013 including:

- Ken O'Donnell, Florida Market President, Busey Bank
- Richard Durnwald, Financial Advisor, Northwestern Mutual
- Marcia Hobe, Fiduciary Officer, Trevett Capital Partners

First Busey Corporation (NASDAQ: BUSE) is a \$3.5 billion financial holding company headquartered in Champaign, Illinois. Busey Bank, First Busey Corporation's wholly-owned bank subsidiary is headquartered in Champaign, Illinois and has thirty-one full service and four limited service banking centers serving Illinois, a full service banking center in Indianapolis, Indiana, and seven full service banking centers serving southwest Florida. Busey Bank had total assets of \$3.5 billion as of September 30, 2012. Busey Wealth Management is a wholly-owned subsidiary of First Busey Corporation. Through Busey Trust Company, Busey Wealth Management provides asset management, investment, and fiduciary services to individuals businesses and foundations. As of September 30, 2012, Busey Wealth Management managed approximately \$4.1 billion in assets. In October 2012, Busey announced the formation

## Workforce Now Forum II

---

of Trevett Capital partners, a private wealth management model created to serve high net worth clientele in SW Florida.

Through Busey Bank, First Busey Corporation owns a retail payment processing subsidiary, FirsTech, Inc., which processes over 22 million transactions per year through online bill payments, lockbox processing, and walk-in payments through its 3,100 agent locations in 38 states.

Busey employs approximately 900 associates. Total revenue for the first nine months of 2012 was \$125.2 million.

1. Its competitive advantage is its relative size, and its ability to make decisions on a local basis. It likes to state, “Busey can out small the big and out big the small banks in our markets”.
2. It expects to grow its various lines of business in a selective and strategic manner by establishing operations in markets where commercial, small business, and private clients or affluent households and businesses reside and conduct business.
3. There are many means available to expand its presence. Florida is viewed as an attractive growth market in the years ahead.

Northwestern Mutual Life Insurance Company was founded in 1857 as a mutual company, which means it has no stockholders. It is owned by its policy owners. Northwestern Mutual Life Insurance Company is the largest direct provider of life insurance in the nation with over \$1.3 trillion face amount in force and over \$200 billion in assets. It also has over \$2.5 billion in assets under advisement with the Frank Russell Company, a wholly-owned subsidiary.

Northwestern Mutual Life Insurance Company’s life insurance market share is 11%, focused exclusively in the US market. The mutual company advantage is that it treats all policy owners alike, whenever possible. The Northwestern Mutual Life Insurance Company value proposition is that it will pay an industry leading dividend exceeding \$5 billion to policy owners in 2013. This is the second highest dividend in Northwestern Mutual Life Insurance Company’s history.

### **Employment and Educational Challenges**

Generally speaking, due to the current economic conditions and low voluntary employee turnover, there are currently few employment gaps. Workers in the financial services industry have become less mobile and unable or unwilling to relocate for work purposes due to having negative equity in their houses (owing more than the house is worth). That said, experienced and proven financial services professionals are in short supply. One reason for the shortage is due to the lack of formal specific training programs, including commercial credit and insurance industry training programs. Another is that the workforce in this industry is aging and there is a relative lack of younger people seeking to enter the field. For example, a frequently cited fact in the industry is that the average financial planner is in his or her fifties. Another is that turnover among young financial representatives is such that only approximately 10 percent of new financial representatives will still be in the industry within 5 years.

Some of the necessary skills to be successful in the financial services industry include accurate written and oral communication skills, a comprehensive knowledge of finance and accounting rules and principles (and the ability to utilize them forensically), a working knowledge of tax laws, an ability to complete business and/or personal financial analyses, and the ability to make decisions, manage time, be persuasive, think critically and be highly ethical. In addition, the incumbent should have a level of maturity, well-cultivated social and interpersonal skills, emotional and native intelligence, and the desire to work with others to accomplish common goals. Some positions, particularly those such as financial planners and insurance advisors, tend to be more entrepreneurial in nature and the incumbent must therefore be a self-starter and self-reliant.

Developing talent for a specialized job description is extremely expensive and time consuming. Educational institutions can assist in the skill or knowledge building effort by providing some course work, although employers should expect to continue in the effort by making a further investment in the developmental needs of their employees. Due to the high training costs and consequent long payback period, many companies poach experienced bankers and other financial service professionals from competitors, reducing costs and the risks of failure and turnover. The demand for experienced professionals is expected to increase, particularly as there are relatively few trainees coming up behind them. The lack of talented professionals is becoming felt and both the industry and education need to redouble their efforts to attract and train new recruits. Compounding the difficulty in attracting young people to the industry to ultimately replace today's professionals, college or graduate school recruiting for the industry has diminished.

## Workforce Now Forum II

---

The salary ranges for various financial services or banking positions were reported as follows:

1. Full-time Teller - \$22,000 to \$33,000.
2. Personal Banker - \$33,000 to \$50,000.
3. Assistant Branch Manager - \$35,000 to \$50,000.
4. Branch Manager - \$42,000 to \$80,000.
5. Business Bankers - \$60,000 to \$100,000.
6. Commercial Lenders - \$80,000 to \$140,000.
7. Residential Mortgage Lender –\$60,000 and higher with commission.
8. Training and Development Manager - \$60,000 and higher.
9. Wealth Management Professionals - \$100,000 and higher.

In addition, incentive compensation opportunities are available to many bank and financial services professionals.

As bank branches are closed, and customer transaction processing activities decline, fewer retail branch positions will be required.

There is an increasing demand for compliance and regulatory bank professionals due to the increasing level of bank regulation. Another employment growth area is information technology and computer engineering. These associates generally support entire organizations from central locations. A related growing need area includes social media marketing/management.

In the financial services industry, as in most other industries examined as a part of the ongoing Workforce Now study, so called “soft skills” are important and are often lacking in otherwise qualified or educated candidates. The themes identified as lacking in financial services industry recruits are eerily similar to those in the other industries studied and include a lack of written communication skills, social and interpersonal skills, confidence, critical thinking, public speaking, and the ability to learn, retain, and apply what is expected and required to be successful on the job. Ethical behavior is essential, and ethics training and modeling are required in daily business activities. A desire and willingness to work cooperatively and efficiently with others is paramount. Many of these skills are also challenging to uncover or evaluate in a candidate for employment. For higher level employees, a desire to be civic and community minded is important. Finally, the ability to continuously learn, adapt, evolve, and change as a professional is essential in financial services today and into the future.

## Workforce Now Forum II

---

The financial sector workforce information is summarized in Table 1.

**Table 1**  
**Financial/Insurance/Banking**

Most Urgent Employment Gaps	Estimated Size of Unemployment Gap	Steps currently Being Taken to Close Unemployment Gaps	Workforce Skills
Experienced financial service professionals	Uncertain	Hiring experienced professionals and offering incentive compensation	Accurate written and oral communication skills
Increasing demand for compliance and regulatory bank			Comprehensive knowledge of finance and accounting rules and
Increasing demand for information technology (IT) and applications			Working knowledge of tax laws
			Business and personal financial analysis
			Able to make decisions
			Persuasive
			Critical thinker
			Ethical
			Social and interpersonal skills
			Teamwork
			Civic minded

## **Workforce Now Study Findings Construction/Manufacturing**

### **Sector Overview**

The US and regional housing market has been improving in 2012 and 2013 with improvements in the overall economy, employment, and disposable household income. The region can expect modest improvements in housing starts and sales in 2013. The housing market is still working through foreclosures and distressed sales, and households face a tight lending market with high loan qualification standards. Many homeowners owe more than the value of their homes and are often referred to as having underwater mortgages. The housing market is expected to gradually improve over the next few years as employment increases, household income improves, and the financial sector adjusts to the new regulatory requirements.

There are several positive indicators for the housing market. Interest rates are at historically low levels and housing prices have been rising since February 2012 as indicated by the S & P Case-Shiller home price index. The S & P Case-Shiller home price indices have increased by 8.1 percent for the 20-city composite index and by 10.8 percent for the Miami area index from January 2012 to January 2013.

Manufacturing includes a wide range of activities and products such as wood products, furniture & related products, plastics & rubber products, electrical equipment, appliances & components, fabricated metal products; paper products, medical devices and supplies, and apparel, leather & allied products.

There remains considerable uncertainty in the global and U.S. economy as the economy continues its recovery from the “Great Recession.” There are general concerns about the impact of new banking regulations, tighter credit requirements, environmental rules and regulations, as well as pension and health care obligations. The latest Institute for Supply Management manufacturing index for March 2013 was 51.3, which is just above the index of 50 indicating an expanding manufacturing output.

This recession and slow recovery have generally changed the company landscape in construction and manufacturing due to consolidations, mergers and companies going out of business. Many people have left the construction industry and developed new careers. Those who remain in either industry face a rapid integration of new technologies that must be learned and understood. Smart appliances and systems are being built into new homes allowing connections over the internet and controls using the



## Workforce Now Forum II

---

smart phones and tablets. Many of the manufacturing companies are using composite materials that are light weight and strong. There are efforts to encourage manufacturing companies to relocate in the United States, including efforts to make the cost of production more competitive.

New technology is increasingly important in areas it has traditionally embraced, including CNC equipment, mechatronics, robotics and automation as a way to reduce lead times, reduce price points, and provide more quality. Companies are being forced to marry “old world craftsmanship” with 21<sup>st</sup> century technologies. Advances in information technology and management are becoming an integral part of the industries. New technology is changing the way work is scheduled and activities are communicated since portable computers or tablets allow continuous communication and coordination of work tasks and schedules, the ability to look up technical specifications, and to order parts and supplies. The companies indicated that workers need to remain flexible and adaptable in their career paths.

Sustainable construction practices are creating change in the industry. Engineers and subcontractors are often required to incorporate sustainable practices into the design as measured by rating systems such as LEED or Green Globe. There is a need to perform Building Integrated Modeling (BIM) and to integrate it with manufacturing so that Computer-Aided Drafting (CAD) design can be converted seamlessly to Computer-Aided Manufacturing (CAM) for production. It is expected that the trend of more sophisticated computerized controls interface to continue which will require more advanced technical computer skills for service personnel.

### Company Overviews

The Workforce Now initiative recruited five executives from construction and manufacturing companies who completed a survey and participated in a Workforce Now Forum on March 19, 2013 including:

- Mr. Jonathan Adams, COO, Adams Group (Casework, millwork, & solid surface);
- Mr. Matt Chambers, President, JRL Ventures, Inc. Marine Concepts;
- Mr. Gary Griffith, President, B & I Contractors, Inc.;
- Mr. Bob Knight, Vice-President, Paul Homes; and
- Mr. Bob Koenig, President, Manhattan Construction.

The executives were very generous with their time and shared their knowledge of their industry, businesses, and employment challenges.

The Adams Group has been in business since 1978 and has approximately 90 team members with annual revenues of \$16.5 million for 2012. It has its headquarters in North Port, Florida, and has approximately 50,000 square feet of manufacturing and storage space. Its markets are regional with team members in West Virginia, Kentucky, Tennessee, and North Carolina. The typical client is a general contractor or construction manager. The firm creates a competitive advantage by providing quality products and service and it creates a solid reputation in business by focusing on the relationship with the client and not just on the current project. The company's biggest challenge over the next five to ten years is how to handle information and data. Adams Group is actively exploring options and opportunities to bolster its information management platform. The company is looking to develop and expand product lines and offerings.

JRL Ventures, Inc. Marine Concepts manufactures composites for tooling, molds and parts for the marine industry, aerospace industry, entertainment industry, military, wind power companies, automotive industry, and local and federal governments. JRL Ventures is an engineering company and a supplier of tooling for new product and replacement tooling for existing product. The company has 170,000 square feet of office and manufacturing space, began in 1976, and has approximately 140 employees in marketing, sales, engineering, designers, administration, accounting, CNC robotic mill operators, and production labor. The company is a one-stop shop for design, engineering, plugs, patterns, molds, and first or limited-run parts. The company feels that it must stay on top of new technology, and invest in capital resources such as equipment, communications, and people.

## Workforce Now Forum II

---

B & I Contractors is a specialty subcontractor for commercial, institutional, and industrial construction projects. Construction services are provided for heating, ventilation, air-conditioning, building management systems, plumbing, electrical, and fire sprinkler systems. The company provides maintenance and services for building owners. The company is employee-owned and has been in business since 1960 with 2012 revenues of \$43 million. It currently has approximately 270 employees working throughout South and Central Florida with the headquarters in Fort Myers, Florida. Its customers include general contractors, construction managers, building owners and managers, government agencies, hotels, convention centers, hospitals, and education facilities. The company creates a competitive advantage by focusing on quality and a well-trained workforce. It has the capability to design and engineer the project, which can use pre-fabricated and planning tools for quick response. It also provides services for highly technical building systems, and provides and manages multiple trades creating economies of scale and increased efficiency.

Paul Homes of Florida is a residential construction company that was started in 1986 with current employment of 10 people. The average revenue is \$6 million building approximately 16 homes each year. The service area is Cape Coral, Lee County and the southern half of Charlotte County.

Manhattan Construction is a large commercial contractor that provides construction management and general contracting work on various building projects including hotels, schools, dormitories, educational buildings, athletic facilities, residential condominiums, apartments, and some road work. This is a national company that is 116 years old and owned and operated by the same family based in Tulsa, Oklahoma. There are offices in Oklahoma City, Dallas, Houston, Atlanta, Washington, D.C, Tampa, Naples, and Fort Myers. There are approximately 120 salaried professionals in Florida completing approximately \$200 million of work. The market area is Southeastern United States and the company deals with a wide array of customers including private companies, developers, and all levels of government.

### **Employment and Educational Challenges**

Adams Group typically struggles to fill project Drafter/Engineering positions that require a unique mix of product knowledge that is typically gained from the plant floor and field. They need to be technically competent to run AutoCAD and be proficient on the computer. A beginning project drafter/engineer can expect to make \$12 per hour to begin and make up to \$20 per hour when fully competent and experienced. The company would probably hire three to five people today to file this role.

The Project Drafter/Engineer should have the following skills and knowledge:

1. Competence in the craft of cabinet construction and installation;
2. Knowledge of materials, hardware, and finish options for cabinet construction;
3. Technically competent in Microsoft windows, Office, and Adobe;
4. Technically competent in AutoCAD;
5. Strong mathematics, written, and verbal skills; and
6. Able to work in a team environment or independently.

Adams Group is taking actions to help close the employment gap by:

- Developing a 10-week internship program that includes a full rotation throughout the shop, installation, and office departments;
- Developing in-house training programs;
- Fostering partnerships between workforce development companies such as CareerEdge and Suncoast Workforce; and
- Working with the school system, technical centers, and colleges to develop wood technology programs.

The company indicated that problem solving, critical thinking, work ready skills, and written and verbal communication skills need to be strengthened independent of the particular position or occupation at the company.

JRL Ventures Marine Concepts indicated that it had five urgent employment gaps that were difficult to fill with qualified employees:

1. Engineers who could use Unigraphics or similar software. The positions offer entry level pay between \$40,000 and \$50,000 and experienced pay levels of \$50,000 to \$80,000;
2. Computer Aided Manufacturing (CAM) positions that use Unigraphics or similar software and pay that begins at \$20 per hour and experienced pay levels of \$25 to \$30 per hour;

## Workforce Now Forum II

---

3. CNC 5-axis Mill Operator positions that are able to use PC and production skills with entry pay at \$15 per hour and experienced pay levels of \$18 to \$22 per hour;
4. Production Supervisors who are able to manage people, read CAD drawings, and have experience in construction and fiberglass manufacturing. Entry level pay is approximately \$50,000 per year with experience pay level of \$70,000 to \$90,000; and
5. Controllers who have experience in manufacturing with entry level pay at \$70,000 per year and experienced pay level between \$100,000 and \$130,000 annually. An MBA would be helpful.

The company stated that mathematics, engineering, accounting, CNC classes, wood shop or carpentry, hand tool skills, tape measures, problem solving, ability to read blue prints or 2D or 3D CAD or Unigraphics drawings, marketing, writing, and Microsoft PC skills are best suited for manufacturing work. The company has previously had an extremely hard time filling these positions and frequently has to recruit from out of the area.

The company has in-house training programs, internships, student visits, offsite training programs and classes, web-based training, partnerships with local colleges and universities, as well as open houses and tours for local educators. The company is working with the Engineering College at Florida Gulf Coast University and with robotic and STEMS groups at local high schools. In addition, the company is working with Florida Work Force and Edison State College to provide employees with educational opportunities.

The company indicated that English (for non-native speaking workforce), problem solving, critical thinking, supervisory training, and communication are critical skills. In addition, many applicants are deficient in the basic skills of using a checking account, understanding health benefits, and retirement planning.

B & I Contractors identified five urgent employment gaps:

1. Sales Engineers with strong technical skills in heating, ventilation, and air conditioning (HVAC) and energy systems, matched with sales and presentation skills;
2. CAD (Computer-Aided Design) Designers with a strong knowledge of computers and AutoCAD products. Must have basic knowledge of architectural, structural, electrical, plumbing, and mechanical systems. Need to be able to read and understand plans and specifications across multiple trades and have an advanced understanding of codes and standards for HVAC, plumbing, and

## Workforce Now Forum II

---

electrical systems. Ideally, the designers should have some level of field experience installing systems;

3. Welders certified by the American Welding Society (AWS) for piping systems. Ideally, the candidates should have experience and knowledge of pipefitting, hydronic systems, and equipment rigging;
4. Service Technicians must understand basic principles of refrigeration. Can achieve understanding through third-party certifications like the North American Technician Excellence (NATE) or through more rigorous apprenticeship training. Technicians must understand hydronic pumping, air distribution, centrifugal refrigeration, and boiler systems; and
5. Control technicians must have most of the skills mentioned above for service technicians but must understand digital controls and computer software in order to integrate the equipment operation with the building management systems. In most cases, manufacturer-specific training is required to be able to program and trouble-shoot these systems.

B & I Contractors offers engineering internships each summer and continuing training to its engineering staff. The company is actively involved with the STEM Team of SW Florida. The company is strong supporter of the Tri-County Apprenticeship Academy (TCAA) located in Fort Myers with over 170 apprentices enrolled in HVAC service, pipefitting, sheet metal, plumbing, electrical, and sprinkler fitter curricula.

The company indicated a need to give students stronger skills in problem solving and critical thinking skills. The new employees need to exhibit accountability along with communication skills. Bi-lingual capabilities including both written and oral communication skills are important as well.

Paul Homes identified the following critical employment gaps:

1. Field superintendents who oversee the entire construction process and should be familiar with all the types of trades on the construction site. The candidate is expected to have at least a high school education and experience in carpentry field.
2. Electricians, Plumbers, and HVAC installers with technical training.

Paul Homes and the entire building industry are working closely with high schools and vocational high technical schools to encourage students to consider an occupation in the construction. The overall skills that need to be strengthened independent of the particular occupation are communication skills, teamwork, writing, basic mathematics, and problem solving.

## Workforce Now Forum II

Manhattan Construction is very concerned that skilled trade employees such as carpenters, masons, electricians, and job superintendents are not being trained and will lead to shortages over the next five to ten years. The emphasis in the schools has shifted away from construction trades and, once the economy recovers, new development projects and general construction will have difficulty finding skilled craftspeople, creating a shortage. The superintendents need to be able to read plans, lead workers, and understand how a project goes together. There is an overall need to strengthen writing and speaking skills. The construction/manufacturing workforce information is summarized in Tables 2 and 3.

**Table 2**  
**Construction/Manufacturing**

Most Urgent Employment Gaps	Estimated Size of Unemployment Gap	Currently Being Taken to Close Unemployment Gaps	Workforce Skills
<b>Adams Group (Casework, millwork, solid surface, granite and stone)</b>			
Project Drafter/Engineer	Needs 3 to 5 currently	10-week internship program	Competence in cabinet construction and installation
		In-house training	Knowledge of materials, hardware, and finish options
		Partnerships Career Edge and Suncoast Workforce Board	Microsoft Windows, Office, Adobe, and AutoCAD
		Support School System, technical centers, and colleges to develop wood technology programs	Strong Mathematics, written and oral skills
All employees			Work independently or as a team
			Problem solving
			Critical thinking
			Written and Verbal Communication skills
<b>JVR Ventures, Inc. Marine Concepts</b>			
Engineers	Recruiting form outside local area	In-house training	Unigraphics or similar software
Computer Aided Manufacturing (CAM)		Internships	Unigraphics or similar software
CNC 5-axis Operators		Student visits	PC and production skills
Production Supervisors		Offsite training programs	Manage people, read CAD drawings
		Web-based training	Experience in manufacturing
Controllers		universities	Experience in manufacturing
		Open houses and tours	MBA helpful
All employees			Mathematics
			Engineering
			Accounting,
			Hand tool skills
			Problem solving
			Writing
			Marketing
			Microsoft PC skills
			CNC classes
			Critical thinking

# Workforce Now Forum II

## Table 3 Construction/Manufacturing

Most Urgent Employment Gaps	Estimated Size of Unemployment Gap	Currently Being Taken to Close Unemployment Gaps	Workforce Skills
<b>B &amp; I Contractors, Inc.</b>			
Sales Engineers		Engineering internships each summer	Heating, ventilation, and air conditioning technical skills
		Continuing education for employees	Sales and presentation skills
CAD Designers		Supports Tri-County Apprenticeship Academy	Computer skills and AutoCAD
			Architectural, structural, electrical, plumbing, and mechanical systems knowledge
			Understand Codes and standards
Welders	Currently in short supply		Field experience helpful
			AWS certified
			Pipefitting experience
			Hydronic systems knowledge
Service Technicians			Equipment rigging knowledge
			Basic principles of refrigeration
			Hydronic pumping
			Air distribution
			Centrifugal refrigerations
			Boiler systems
Control Technicians			Must have same skills as service technicians
			Understand digital controls and building computer software programs
All employees			Problem solving
			Critical thinking
			Accountability
			Communication skills
<b>Paul Homes and Manhattan Construction</b>			
Field Engineers or Job superintendents	Concern that there will be shortage of construction workers when building picks up	Work closely with high schools and technical schools	Oversee construction process
			Familiar with construction trades
			Expected to have at least a high school education
			Carpentry experience
Electricians			
Plumbers			
HVAC installers			
Masons			
All employees			Oral and written communication
			teamwork
			Basic mathematics
			Problem solving



## **Workforce Now Study Findings Tourism/Hospitality**

### **Sector Overview**

The industry is service based, including a variety of amenities such as hotel, resort hotel, restaurant operations, cruise and sightseeing, fishing, catering, events, food and beverage, and all things related.

The industry has changed which is reflected in the cost cutting and wage freezes over a 2-3 year period during the recession. For instance, since the recession, the industry has dropped rates, which has negatively impacted the profitability of the resorts; thus, there have been reductions in staffing and amenities to compensate. In terms of food and beverage, there are also changes associated with the customer expectations of products and services as part of the changing social fabric, i.e., Sunday dinner with the family is not necessarily a treat or special occasion but part of the lifestyle routine and a right.

There has been extraordinary growth in the use of technology; hence, the industry has had to adjust the way it communicates with consumers both via websites (making it friendly to tablets and smart phones) and via social media. Additionally, the growth and popularity of online travel sites (such as Expedia and Orbitz) as a distribution channel has created a need for a much more finite management of hotel inventory and pricing. In addition, sites such as TripAdvisor have had a very large impact on the industry as a whole since now consumers check these sites to get “independent” reviews of hotel properties before booking. Hotel managers now have staff in place who know how to best manage and utilize all these new points of contact with potential guests.

The industry predicts some impact for resort hotel and restaurant operations from the Patient Protection and Affordable Care Act (PPACA). Currently, the organizations that provide healthcare to their full-time staff members take this as a hiring advantage, especially in the Food & Beverage outlets. This may change in the coming years as more employers offer healthcare; therefore, it is expected that restaurant management positions will become more competitive due to a leveling playing field.

The industry expressed a need to be more innovative in how it presents and markets its services, which also include a better understanding and management of costs and commodities as they continue to rise. It is important to establish differentiators on where to choose to spend dollars. Industry leaders observed that there has to be an “ease to use” consideration (technology, access, reservation, payment, etc.). Trends such as local products, healthy kid menus, and sustainability are expected to grow and influence

## Workforce Now Forum II

---

the dining choices. On the other hand, new products will be limited as financing is still often challenging to obtain, so that the new inventory for hotels will be limited over the next three years or until dollars are freed up and construction in hotels/resorts begins again.

The tourism/hospitality industry is expected to grow its use of technology, which may result in a greater need for staff who are technologically savvy. It is also predicted that there will be growth in international tourism. With the creation of Brand USA, heightened marketing of visits to the United States seems likely. The Southwest Florida community already benefits from strong international tourism and it is projected to continue to grow.

In summary, the primary driving forces of these changes are technological advances. However, there are concerns related to government regulation including PPACA, expanded Family and Medical Leave Act (FMLA), immigration, and requirements related to sick pay. Another observed concern is how to effectively market individual components, to the baby boomers, while trying to remain relevant with the younger generations (30s) where communal seating and technology (be it pay at the table, ordering, etc.) are important. The industry recognizes the need to retain the older guests and provide them the level and type of services they desire. It also recognizes the younger customer to be the next wave of influential users of products and services.

The “ease of use” and escalated use/monitoring of Social Media are seen as the expected evolution of existing products and services. Moreover, there is a need to continue to enhance the lodging properties with reinvesting in the assets. The industry needs to be vigilant in the protection of the environmental resources, i.e. beaches, birding, fishing, air, and water quality that serve as the main draw. The greatest assets are the gifts from Mother Nature and the industry must continue to protect these assets.

Finally, the future products depend on what customers want. Within the hotels, the future is related to the technology demands, including Wi-Fi bandwidth, which has been a constant challenge. Overall, it is important to have more in-area marketing by local businesses once visitors/potential customers are nearby, such as directly to smart phones. The industry requires continuing development and improvement in product range and to advance and adapt new technologies to the existing assets.

### Company Overviews

The Workforce Now initiative recruited five industry leaders from the tourism/hospitality industry who completed a survey and participated in a Workforce Now Forum on March 19, 2013 including:

- Ms. Tamara Pigott, Executive Director, Lee County Visitor & Convention Bureau;
- Mr. Mark Blust, V.P. Marketing and Operations, Prawnbroker Restaurant Group;
- Mr. Bill Waichulis, Senior Vice President of Operation, Boykin Management Company;
- Mr. Gary Locke, Director of Operations, SunStream Hotels and Resorts; and
- Capt. Lance H. Jullian, Pure Naples and Marine Team International, Inc.

The executives were very generous with their time and shared their knowledge of their industry, businesses, and employment challenges.

The Lee County Visitor & Convention Bureau is tasked with managing destination marketing. Its job is to encourage people to come to the Lee County Community either for a leisure vacation or to hold their business meeting (conference, board of directors' meeting, etc.) in the area. All these amenities create jobs and have a very large economic impact on the Lee County Community.

As an example, some 2012 Lee County Statistics include the following::

- Nearly 4.7 million visitors – slightly more than ½ (2.4 million) stayed in paid accommodations.
- Visitors staying in paid accommodations directly spent \$1.7B, while total visitors expenditures (including those staying with friends and relatives) spent \$2.7B.
- Resident Employment Impact (jobs created) as a result of tourism is 52,257.

The Lee County Visitor & Convention Bureau has 25 employees, and is funded by 53.6 percent of the tourist development tax (a budget of approximately \$13.5M). It has been in existence for 30 years in the global market area. Travelers – primarily from the mid-west and northeast – are typical clients/customers. Twenty percent of the total visitors are international, with Germany being the leading country of origin in the international market. The Bureau has a competitive advantage in a combination of natural beauty and quality customer service; however, the expansion plans for the next five years will be dependent on market conditions. There is a strong desire to continue to be a “lean” operation so that majority of the bureau’s budget continues to be allocated to marketing the destination.

## Workforce Now Forum II

---

Prawnbroker Restaurant Group consists of four restaurants in the local area and has been in business for 34 years. Cumulatively across all of its locations, revenues are around \$11 million with an employment range of 150-200. Based on location, typical clients/customers are from predominantly white-collar businesses, families, tourists, and residents, both local and year-round. The creative advantage is still using the whole fish when possible, and community involvement from an industry that typically has difficulty leaving the confines of the business.

The organization does not expect to change for the next five years; however, it has transitioned to a new system that allows the owners to retreat from the day-to-day operations and decision-making at will. That trend may continue to grow.

The Boykin Management Company has over 340 employees at three locations and has been in business since 1958. Its market area is global with the target age of 35-55 and a household income of \$100,000 or more. The company's competitive advantage is to provide for positive experience and memories to generate repeated customers. Over the next five years, the organization will continue to acquire new hotels at 1-2 properties per year.

SunStream Hotels and Resorts include 230 employees within Lee and Collier counties as well as another 20 in Volusia County. Its market area is local, and it has a goal to grow via projects in Central Florida and other states. Typical clients/consumers are mostly from Florida and Southeast US during the summer, and international and Midwest and Northeast US during season. The company offers high-level accommodations in one of the most incredible locations on earth. It also caters to families who want additional space for extended stays. The organization plans to take better advantage of technology to reach potential guests and continue to look for opportunities in both the immediate area and nationally.

Pure Naples, a company developed from its origin of Cruise Naples, promotes Naples Bay and the Northern 10,000 Islands of Southwest Florida. The company offers a broad selection of fun activities to enjoy the warm waters of the Gordon River, Naples Bay, and the Gulf of Mexico and is about pure fun and sharing some of the local history and ecological facts of interest. It includes 25 employees with \$3.2 M sales and 18 pieces of floating equipment in a very strong local market and increasing in the regional and global markets. Local residents and their friends, snowbirds, short-day, and weekend travelers are the typical clients and customers. The company provides a unique product mix for the value of money and is able to give customers the best to see (i.e. dolphins) service on the bay. Finally, the organization plans to improve efficiencies and streamline the customer services through fewer hands on processes with improved systems. For the next five years, the expansion plan is to ensure the strength of each product.

### **Employment and Educational Challenges**

SunStream Hotels and Resorts reported that its most urgent employment gaps were for entry-level employees such as room attendants, food and beverage servers, bartenders, and guest service agents. It also indicated a need for graphic artists and marketing staff. Although the top five urgent employment gaps include unskilled labor positions, basic interpersonal skills are very important such as being presentable and friendly, making eye contact, and speaking clearly. The resort is increasing pay and benefits to retain staff and continues to investigate other programs such as H2B visa program for temporary or seasonal, non-agricultural employment. Boykin Management Company indicated that they primarily rely on internal development of employees.

Pure Naples provides tourist water activities for Naples and reported that its most urgent employment gaps were for boat captains with the appropriate Coast Guard certificates. In order to close the current unemployment gaps, it has an internal development plan to prepare employees for the next step in their careers.

Prawnbroker Restaurant Group reported that its most urgent employment gaps were in management and mid-level management but the gaps are short-lived and their size is not significant. The gaps are addressed by hiring for attitude and then managers work with employees to equip them with the skills that they will need. Management responsibilities included customer safety, fiscal and budget activities, management of mid-level management, hiring and training activities, scheduling of the workforce, monitoring and managing the guest experience and food quality, and marketing. The managers are paid between \$45,000 and \$52,000 base salary with an additional bonus between \$10,000 and \$30,000 per year.

The mid-level manager supervises the hostesses and food servers, ensures quality guest experience, maintains standards, and needs good business and communication skills. Both mid-level and management positions require a minimum of a high school diploma with some additional education in general business classes, including accounting, math, speech, composition, and computer skills. The mid-level managers make between \$36,000 and \$45,000 per year.

Front-office staff such as hostesses or food servers and back-office staff such as cooks are also difficult to find. Another important challenge is that most employees are non-English speaking. The non-tipped hourly wage range for hostesses and food servers is \$9 to \$15 and for cooks it is \$10 to \$15 per hour.

## Workforce Now Forum II

---

Workforce skills that are needed by the Prawnbroker Restaurant Group include:

1. Money mathematics, being able to make change and run a cash register
2. Communication skills including how to address customers and penmanship
3. Understanding financial and budget data and statements
4. Teamwork
5. Creative thinking
6. Conflict resolution
7. Organizational skills
8. Ability to read social cues
9. Problem solving

The entry-level employees are working since they need a job and do not set out to get into the hospitality business. In a lot of cases, it is considered a temporary job but becomes a substantial part of their work resume. A graduate of a hospitality program may not want a job with an independent restaurant and be better suited for larger hotel chains or hospitality companies.

The employment and educational challenges for Tourism/Hospitality are summarized in Tables 4 and 5.

**Table 4  
Tourism/Hospitality**

Most Urgent Employment Gaps	Estimated Size of Unemployment Gap	Steps currently Being Taken to Close Unemployment Gaps	Workforce Skills
<b>SunStream Hotels and Resorts</b>			
Entry level employees (room attendant-maid, food server, bartender, guest service agent positions, etc.)	Continue to have an employment gap in the entry level jobs	Increasing pay rates and benefits to retain current staff.	Presentable -too many applicants are coming in with neck tattoos, too much body jewelry, etc...
Graphic Artists		Continuing to investigate options for additional employees including H2B programs, etc.	Need friendliness. Many candidates lack basic skills-smiling, eye contact, clear speech, etc... If they can smile and are pleasant, we can train them on most other job skills.
Marketing Staff			
<b>Boykin Management Company</b>			
		Internal development of employees, developing line employees, and managers to be prepared for the next step in their careers.	

# Workforce Now Forum II

---

**Table 5**  
**Tourism/Hospitality**

Most Urgent Employment Gaps	Estimated Size of Unemployment Gap	Steps currently Being Taken to Close Unemployment Gaps	Workforce Skills
<b>Pure Naples</b>			
Captains (\$16 to \$18 per hour start)		Train and educate within company and promote on merit and ability	The U.S. Coast Guard Certificate Requirements No Drug or Alcohol (Zero Tolerance)
<b>Prawnbroker Restaurant Group</b>			
Management	Gaps expected to be short in duration	In-house training	Money Mathematics
Mid-Level Management		Interns at FGCU	Use of proper grammar in addressing and communicating with customers
Front House Staff (serve guests)		New hire orientation	Penmanship
Back House Staff (cooks)		Best Practices Management Sessions	Creative thinking
			Conflict resolution
			Organizational skills
			Interpret social clues
			Understand social cues
			Problem solving
			Teamwork

### Conclusion/Summary

This is the second report generated by the regional Workforce Now initiative providing important information about employment gaps and skills desired by regional employers. The three business sectors studied included:

1. Financial/Insurance/Banking
2. Construction/Manufacturing
3. Tourism/Hospitality

Twelve different companies participated in the study and provided workforce information based on a 17-question survey. In addition, a forum was held at Edison State College and regional educational institutions were invited to hear a panel discussion of this study's findings. Each of the business sectors is continuing to recover from the worst recession since the great depression.

The financial business sector indicated that the rules of operation have changed with new legislation and regulations. Technology is also changing the way that the financial sector interfaces with customers who require internet based banking and applications for mobile devices. The employment gaps identified for the financial sector were in compliance and regulatory areas as well as information technology areas. The necessary skills to be successful in this business sector were written and oral communication skills, knowledge of finance and accounting principles and regulations, working knowledge of tax laws, business and financial analysis, ability to make decisions, time management, persuasion, critical thinker, and ethical. Salaries for positions ranged from \$22,000 to over \$100,000.

The construction/manufacturing business sector indicated that new information technologies are reshaping their business. Laptop computers, tablets, and smart phones are becoming part of the worker scheduling, building maintenance, ordering parts, and monitoring advanced building climate controls. Advanced CNC and robotic machines are becoming more common and allow a higher quality product while increasing flexibility of the design and response time. The companies interviewed spoke of "old world craftsmanship" with 21<sup>st</sup> century technology. The employment gaps identified for the construction/manufacturing sector were Drafter/engineers, certified welders, service technicians, control technicians, computer-aided designers (CAD) and computer-aided manufacturing (CAM) operators and programmers, CNC 5-axis mill operators, sales engineers, production supervisors, and controllers. The overall skills that the business sector would like to see strengthened are problem solving, critical thinking, work-ready skills, communication skills, mathematics, engineering, CNC skills, wood shop or carpentry, hand tool skills, and ability to read 2D and 3D drawings.



## Workforce Now Forum II

---

The Tourism/Hospitality business sector also indicated that new communication technology such as social media applications and searchable websites were changing the way to do business and communicate with customers. Technology is allowing the business sector to target specific groups of households. There is concern that new regulations including health care and immigration may limit the employee pool or significantly raise operating costs. The hard-to-fill or critical positions identified by this business sector included entry-level employees, including room attendants, hostess, food servers, cooks, and guest service agents. The group indicated that graphic artists are important, along with Coast Guard certified boat captains. They also indicated that management and marketing staff are needed. Independent of the position in Tourism/Hospitality the business sector group wanted potential employees to have more business mathematics skills, communication skills, creative thinking, conflict resolution, organizational skills, ability to read social skills, and problem solving skills.

Appendix A:  
Interview Guide  
**Workforce Now**

**Industry/Sector Overview/Perspective**

1. Please provide an overview of your industry and goods and services that you provide.
2. How has your industry changed over the past five years?
3. How is your industry expected to change over the next five years? Ten years?
4. What do you see as the primary “driving forces” of this change (technological change, globalization, regulations/deregulation; knowledge work; and market dynamics, etc.)
5. What do you see as the expected evolution of your existing products and services?
6. What are new products and services that you will provide in the future?

**Company/Organization Overview/Growth Plans**

1. Please provide an overview of your company/organization? (size, number of employees, annual revenue, years in business, and locations)
2. Describe your market area? (Global, national, regional)
3. Who are your typical clients/customers?
4. Why does the market (clients) value your company’s products and services over your competitors? (How have you created a competitive advantage?)
5. How do you think your company/organization will change over the next five years? Ten years?
6. Can you share your expansion plans for the next five years? 10 years?

## Workforce Now Forum II

---

### **Employment and Education Challenges**

1. Please describe the most urgent employment gaps where it is difficult to find qualified employees. (Describe positions or occupations needed such as CNC machine operators including entry level pay/compensation levels and experienced level pay/compensation levels. Presentation might also include a picture of an employee at work or a short video clip).
2. Please provide an estimate of the size of the employment gap for each critical position or occupation identified and how it is expected to change in next five years and in ten years.
3. For the top five urgent employment gaps identified, please describe the responsibilities of each position or occupation, skills, and educational level or certification that you are looking for that occupation or position. (The research plan is to separately and periodically interview the companies/organizational managers to provide a more detailed list of employment gaps along with occupational responsibilities, tasks, knowledge, skills, abilities, and tools and technology in written form that can be referenced by educational institutions).
4. What actions are currently being taken to close the employment gaps? Please describe. (These might include an in-house training program, internships, teacher or student visits, presentations, job and internship fairs, partnerships between companies and the Workforce Development Board, school systems, technology centers and schools, colleges, and universities, and other?).
5. Are there workforce skills that need to be strengthened independent of the particular position or occupation at your company? (These might include reading comprehension, active listening, problem solving, critical thinking, writing, speaking, monitoring, judgment and decision making, active learning, and coordination).

# Appendix B

## Detailed Position/Job Descriptions

2701 Prince Street  
Ft. Myers, FL. 33916-5529



Phone: (239) 332-4646  
Fax: (239) 332-5928

CMC056245 CFC057484 EC0001109  
SFM 14903900012009

### Job Description

**POSITION:** Controls Engineer/Project Manager

**REPORTS TO:** Service Department Manager

**SUMMARY:** The controls engineer/project manager works as the project leader to plan, execute, and complete control systems projects with both service and construction market customers. Performs or delegates tasks as required to execute and fully complete building automation, security, access control, and other projects including: project estimation and bid pricing, writing proposals, hardware design, system programming and engineering, installation coordination, system and network commissioning, and project closeout.

**DUTIES:** Typical Control Engineer Duties and requirements.

1. Completes typical installation hardware design and software programming using established industry standards. Provides detailed information to communicate design and operation to customers, staff and subcontractors.
2. Develops innovative control strategies and solutions to increase the marketability and sales potential of building automation, access control, and security/surveillance systems to new and existing customers and markets.
3. Designs building automation systems for large and/or complex buildings consisting of mechanical system layouts, electrical drawings, bill of materials, sequence of operations, and device and DDC point schedules.
4. Develops and utilizes knowledge of current industry trends, energy conservation methods and best practices, and ASHRAE and LEED design principles pertaining to buildings mechanical systems, and control systems to design automation systems and control strategies that meet and exceed industry standards.
5. Manages and completes the design, engineering, loading, device verification, and commissioning of all system controllers and devices as required. Validates complete system functionality and resolves issues with subcontractors and others to ensure proper operation of system.
6. Actively works in conjunction with sales engineers to market system solutions and products to mechanical design and consulting engineers, engineering firms, and new accounts.
7. Obtains pricing and availability from outside vendors and suppliers, mechanical and electrical subcontractors including scope, terms and conditions.
8. Designs and provides accurate project submittal, as-built, and commissioning documentation and drawings as required by project scope.
9. Perform all of the required duties while adhering to the company safety policies and regulations.

### MINIMUM REQUIREMENTS / EXPERIENCE:

The controls engineer/project manager will have a minimum of an Associate's Degree in an applicable field with three years of field experience or a minimum of six years of equivalent related field experience in the HVAC industry. The individual must have relevant, technical hands-on experience in system design and commissioning of building automation, security, access control, and surveillance systems. Must be able to work independently and without supervision within a structured team environment. Strong computer skills are required, and knowledge of MS Word, Excel, Visio, Windows operating systems, and electrical CAD are needed. Comprehensive knowledge of computer networking principles, network architecture, and IT knowledge. Must have extensive knowledge of control system theory and HVAC programming experience and familiarity with Honeywell, JCI, Alerton, Automated Logic, and Tridium products is required. Individual must have successfully completed the Tridium AX Certification course.

[www.BandifContractors.com](http://www.BandifContractors.com)

# Workforce Now Forum II

---

2701 Prince Street  
Ft. Myers, FL. 33916-5529



Phone: (239) 332-4646  
Fax: (239) 332-5928

CMC056245 CFC057484 EC0001109  
SFM 14903900012009

## JOB DESCRIPTION

**POSITION:** Senior Air Conditioning Service Technician

**REPORTS TO:** Service Department Manager

**SUMMARY:** Perform maintenance, service and repair of commercial air conditioning equipment including but not limited to air handlers, air cooled chillers, water cooled chillers, cooling towers, pumps, packaged rooftop, fans, and boilers.

**DUTIES:** Typical service duties and requirements.

- Perform routine maintenance on all types of mechanical equipment including filter replacements, belt replacements, greasing, and performance evaluations including recording all temperatures, pressures, subcooling and superheat.
- Trouble-shoot, service and repair as needed all types of mechanical equipment.
- Be able to clearly and professionally communicate to customers any issues that are discovered during maintenance procedures and or repairs that may be required.
- Be able to communicate to the office any additional work that may be required or will require a follow up proposal.
- Be able to give direction and oversee the actions of an apprentice if under your direct supervision.
- Have the ability to adjust schedules and project timing to best fit the needs of the company and our customers.
- Perform all of the required duties while adhering to the company safety policies and regulations.

### MINIMUM REQUIREMENTS / EXPERIENCE:

Have a solid understanding of air conditioning, heating and HVAC systems with a two (2) Technical College Degree or equivalent Trade School Diploma. Be competent in the proper installation and service practices for duct systems, DX piping systems, chilled water piping systems, thermal storage systems and building automation systems. Broad computer skills, ability to operate on windows platform, access system diagnostics.

### PHYSICAL REQUIREMENTS:

Must be able to see well (either naturally or with correction); use hands, fingers, arms and legs fully; lift up to 100 lbs., stoop, kneel, crouch and crawl; climb and balance on ladders and scaffolds; stand for long periods of time.

[www.BandIContractors.com](http://www.BandIContractors.com)

# Workforce Now Forum II

---



## JOB DESCRIPTION

**POSITION:** CAD Manager  
**REPORTS TO:** Senior Project Manager  
**SUMMARY:** Function & Scope:

This position is responsible for all company CAD needs and requirements including scheduling shop drawings coordinating with all trades, prioritizing resources, and meeting deadlines. Requires hands on technical ability with CAD and proficiency with building construction, job coordination between trades. Produce as-built drawings as required.

### ESSENTIAL FUNCTIONS:

Typical Essential Functions include but are not limited to the following:

- Manage all drafting activities for HVAC, Plumbing, Sheet Metal, Electrical and Fire Protection scopes.
- This is a working Manager Position. The CAD Manager shall be competent to use CAD software products and will work actively as a CAD draftsman as required to meet company needs.
- Includes managing and hiring draftsmen as required to meet workload requirements and support needs.
- If outsourcing of drafting services is required, the CAD Manager will have responsibility for procurement and management of those subcontractors.
- Attend turnover, start-up and close-out and coordination meetings as required to support CAD, Pre-Fab and CAM needs.
- Maintain a working knowledge of Industry Standards and current software and hardware products that are required to meet CAD (Computer Aided Drafting/Design), Pre-Fabrication and CAM (Computer Aided Manufacturing) needs for B & I. This may include participation with tradeshow or other professional organizations that support CAD and CAM in the Construction Industry.
- Provide training and support for in-house CAD applications and software applications for all users within the CAD Department or other users outside the CAD group.
- Ensure the CAD software and systems are efficient; optimize and maintain appropriate licenses required to meet company needs.
- Develop and maintain yearly departmental budgets to support CAD operations.
- Responsible to maintain accurate files of all ongoing projects and as-built files for all completed projects. Coordinate the storage of these files with Project Management Team and in-house IT Manager.

### PHYSICAL REQUIREMENTS

Must be able to walk, stand, sit, stoop, kneel, climb stairs, reach overhead, push, pull, lift and carry up to 50 lbs., must have dexterity of fingers (or mechanical substitutions).



## JOB DESCRIPTION

**POSITION:** Pipe Fitter/Welder  
**REPORTS TO:** HVAC Foreman  
**SUMMARY:** Layout, assemble and install HVAC piping and equipment.

### **DUTIES:**

1. Layout, assemble and secure parts and equipment to be welded.
2. Install HVAC piping and equipment.
3. Coordinate with foreman regarding requirements of an assigned task. Make sure assigned task is fully understood.
4. Work within precise limits or standards of accuracy.
5. Work safely and utilize all safety equipment required for a specific task.
6. Assist with training of apprentices/helpers.
7. Maintain standards of quality to eliminate rework.

### **MINIMUM REQUIREMENTS/EXPERIENCE:**

1. Capability of reading and interpreting line sketches to be able to put into a working plan.
2. Work skillfully with tools.
3. ASME 6G certification required for welders.

### **PHYSICAL REQUIREMENTS:**

Must be able to see well (naturally or with correction) walk, stand, sit, stoop, kneel, climb ladder, climb stairs, reach overhead, push, pull, lift and carry up to 50 lbs., must have dexterity of fingers (or mechanical substitutions).



## **SERVICE SALES ENGINEER AND PROJECT MANAGER**

### **SUMMARY OF POSITION GOALS**

This position shall be responsible for the outside sales and project management for the following scope of projects.

- Service maintenance agreements
- Retrofit and equipment replacement contracts
- Small construction projects including design/construct, tenant build-out and other negotiated small construction projects.

Emphasis shall be on prospecting new long term service customers, but includes maintaining existing client base.

### **POSITION RESPONSIBILITIES**

- Create a strategic marketing plan that has a well-defined market and sales approach. The plan shall include sales volume and gross profit goals for Maintenance agreements, developing new customers, and retrofit sales.
- Develop new marketing tools to emphasize the service capabilities of B & I to new and existing customer base.
- Learn and understand B & I's estimating procedures. Prepare cost estimates and/or coordinate pricing with Estimating Department.
- Manage installation crews for small construction/retrofit projects or coordinate job requirements with other B & I installation departments for larger projects.
- Project management of small construction retrofit projects including submittals, buy-out, coordination of resources/subcontractors, punch lists and closeout.
- Communicate with customers regarding job progress.
- Coordinate projects with Accounting Department, including initial contract review, job costing (if required), billings, approving payables, change orders and collections.
- Coordinate workload with other B & I Departments as required.

### **ACCOUNTABILITY**

- The Sales Engineer will be responsible for weekly and monthly reporting of goals and results to the Service Department Manager.
- Sales territory shall be the same geographical area that is presently covered by B & I Contractors for its construction work.
- Service Manager and/or Senior Estimator must approve all quotes, estimating procedures and/or minimum mark-up.



---

## Workforce Now Forum II

---

### SunStream Hotels and Resorts Guest Service Agent (Page 1 of 7)

**Accountable to:** Guest Services Manager

**Main Areas of Responsibility:**

**Hours Required Weekly:**

1.	Customer Service	5
2.	Daily Operations	30
3.	General Standards	5

### **Customer Service and Practice of Daily Essentials**

**Time Required:** All Working Hours

**Tasks Required:**

1. I will own and immediately resolve guest complaints to ensure complete guest satisfaction and resolution. I will be responsive to the needs and wishes of our guests, owners and clients.
  - When handling a guest complaint, do not blame another person or department; Accept responsibility for the complaint, apologize and give the guest the assurance that you will do what it takes to assist them. Follow through to ensure an appropriate response was offered. Follow-up by speaking to the guest directly or leaving a voicemail message (include your name, date and time) informing them of outcome.
2. I will anticipate the needs of our guests, owners and clients to provide extraordinary experiences, and am empowered to handle the needs of any guest to the best of my ability.
  - If a guest asks a question and you are unsure of the answer, reply with “I will find out for you” rather than “I don’t know”. Once you obtain the answer, communicate appropriately to the guest.
3. I will smile and greet every guest in a sincere and professional manner. I will make eye contact and use the guest name at every opportunity.
  - If you are busy, acknowledge the guest and let them know you will assist them momentarily.
4. I will maintain a professional appearance and use appropriate language for the workplace, such as “My pleasure”, “I’ll be happy to”, and “Certainly”.
  - All personal discussions should be held away from a guest’s earshot. Always remain professional when using the company radios or on a phone call.

### SunStream Hotels and Resorts Guest Service Agent (Continued Page 2 of 7)

- Allow all guests to enter and exit the elevator first. When in an elevator with a guest, inquire about their stay. Keep the conversation on a professional level. When in the elevator with a guest and another employee, keep the focus on the guest or the conversation on a professional level.
5. I am responsible for providing uncompromising standards of cleanliness at any SunStream property.
  6. I will foster innovation, creativity and a culture of passion at work, which will inspire others around me.
  7. I am knowledgeable about SunStream's properties and the local community to help answer guest inquiries. I will always recommend the SunStream's food and beverage outlets first.
    - Whenever given the opportunity, thank the guest for their business and let them know we appreciate them choosing our resort/restaurant. Then, ask them to come back again.
  8. I will practice safe working habits at all times and immediately report accidents and unsafe conditions to my Supervisor.
  9. It is my responsibility to know, own and energize SunStream's Vision, Mission & Values and 3 Steps of Service.

#### **VISION**

SunStream will be a premier hotel management and development company by exceeding expectations and capitalizing on opportunities for growth.

#### **MISSION**

We create memorable experiences and fulfill even the unexpressed wishes of those we serve.

#### **VALUES**

These values guide our thinking, inspire our service and help to direct our efforts, decisions and behavior on a daily basis.

- Consistent Quality Service – We hold ourselves and each other accountable to delivering only the best products and services to our customers.
- Honest, Ethical Behavior – We practice this behavior because it builds confidence and trust in each other and our customers.
- Effective Communication – We communicate to all team members to create a culture of inclusiveness, increase efficiency, satisfy customers and improve quality.

### SunStream Hotels and Resorts Guest Service Agent (Continued Page 3 of 7)

- Respect & Teamwork – We value the differences that make each person unique and we win together by working as a team with mutual respect, trust and open communication.
- Strategic Planning – We set clear goals and explore more efficient and innovative solutions that address competitive challenges.
- Fun! – We work hard. Incorporating fun within our workday keeps us motivated and encouraged to do our very best.

#### **3 STEPS OF SERVICE**

1. Acknowledge all guests with a smile, eye contact and sincere greeting. Use the guest's name when possible.
  2. Anticipate all guest needs. Inquire, respond, communicate and follow through.
  3. Thank all guests, invite them back and wish them a fond farewell, using the guest's name when possible.
10. I know what the letters in F.I.R.S.T. represent and I understand my role in making SunStream "First in Hospitality".
- Friendly, Innovative, Reliable, Sincere, Team Oriented
  - Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

### **Customer Service**

#### **Tasks Required in Sequence:**

1. Make eye contact AND acknowledge all guests/staff with a warm, sincere smile and a greeting of "Good Morning", "Good Afternoon" or "Good Evening". Use guest/staff name if known. If not known, use "Sir" or "Ma'am".
2. Acknowledge and respond to all guest requests or complaints promptly and efficiently. Inform the guest "I will take care of that." Internally provide solutions; make decisions and solicit advice of supervisor when necessary. When taking a guest complaint, do not blame another person or department, accept responsibility for the complaint, apologize and give the guest confidence that you will do what it takes to assist them. Follow through to ensure an appropriate response was offered Follow-up by speaking to the guest directly or leaving a voicemail message (include your name, date and time) informing them of outcome.

### SunStream Hotels and Resorts Guest Service Agent (Continued Page 4 of 7)

3. Acknowledge and greet all guests that are waiting for assistance. Let them know you will be with them shortly, making eye contact.
4. Be direct, polite and simple with guests. If you are unsure of an answer, reply to the guest “I will find out for you” rather than “I don’t know”. Once you know the answer communicate the results to the guest.
5. Be consistent with guests. Standardize phrases that are re-occurring, i.e. “check in time is at 3pm, but we can complete your paperwork now in order to save time when you return.”
6. Portray a positive, friendly, professional and polite attitude. Offer assistance “How may I help you?”
7. Exceed the guest’s expectations by offering information before they need to ask for it.
8. Whenever given the opportunity, thank the guest for their business and let them know we appreciate them staying with us. Then, ask them to come back again.
9. Communicate effectively with fellow employees, passing along information regarding guests with special needs or attention.
10. All personal discussions should be held away from a guest’s earshot. Always remain professional when using the company radios or on a phone call.
11. At check-in fill out the guest vehicle registration, while the guest fills out their registration card. Instruct them of the amenities of the hotel, give them a property map and explain room locations.
12. When servicing a guest, focus all attention on the guest and the guests’ needs. If interrupted by a fellow employee, inform the employee you are with a guest and will have to get back to them. Unless the interruption is that of an urgent nature, then explain to the guest the need to assist.
13. Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

### SunStream Hotels and Resorts Guest Service Agent (Continued Page 5 of 7)

14. At guest check out have them review the charges and ask them if they would like the remaining charges on the same credit card. Have them sign a copy then give them a copy for their records. Ask them about their.
15. The entire task on the am/pm check list and the night audit check list need to be done every day. And if any problems on why these cannot be completed, it should be noted on check list.
16. Answering machines messages left overnight should be answering by 9:30am every day and checked throughout the day. Any messages left during the day should be responded to within 30 min. of the message being left.

#### **Performance Outcomes (Smart Goals) Required:**

1. Increase or maintain guest satisfaction good and excellent responses on comment card scores at 90% or better.
2. Maintain mystery shopper scores at 85%.
3. Increase guest response time by responding to a guest's need the same day.
4. Name mentioned on Comment cards at least 5 times per month in a positive manner.
5. Add value to at least one guest per day.

#### Daily Operations

##### **Tasks Required in Sequence:**

1. Register guests & assign rooms complying with special requests if possible
2. Assist in pre-registration and blocking of rooms for registration
3. Thoroughly understand and follow proper credit, cash checking and cash handling policies and procedures.
4. Understand and monitor room status information
5. Be knowledgeable in room location and type of rooms available and room rates
6. Use suggestive selling techniques to sell rooms and to promote other services
7. Coordinate room status updates by notifying housekeeping department of all checkouts, late checkouts, early check-ins, and any VIP status arrivals.
8. Have a working knowledge of the reservations department, take same day reservations and future reservations when necessary.
9. Manage room keys

### SunStream Hotels and Resorts Guest Service Agent (Continued Page 6 of 7)

10. Operate front office equipment – computer, printer, key card machine, credit card machine, fax machine and copier.
11. Whenever possible open the front door for guests entering and exiting the property.
12. Assist co-workers when needed.
13. Be personable, warm, and friendly whenever you are performing any of these tasks.
14. Process guest check-outs
15. Post and file all charges to guest folios and other accounts
16. Follow procedures for issuing and closing safe deposit boxes used by guests
17. Process mail, packages and messages
18. Read and initial the pass-on log and bulletin board daily, are aware of daily activities and meetings taking place on property.
19. Attend and participate in department meetings
20. Coordinate and communicate guestroom maintenance work with the maintenance department.
21. Report unusual occurrences or requests to the Guest Services Manager
22. Maintain the cleanliness and neatness of the front desk area
23. Maintain cash drawer, process all credit cards to balance audit at end of shift.
24. Make sure all supplies are available and ready to provide to the guests, i.e. Key packets, coupons stuffed, room charging cards prepared ahead of time.
25. Complete daily checklist – running/completing reports as listed
26. Turn phones, guest or meeting room, on/off as needed
27. Process advance deposits
28. Maintain gift shop items, posting to rooms and/or selling and posting to gift shop folio.
29. Rotate month-end files to storage – prepare for upcoming month files.
30. Input wake-up calls and keep accurate log of these calls as requested.
31. Follow-up on guest requests – call in to proper dept. and/or guest to assure completed.
32. Follow procedures for walk-in reservations to guarantee proper incentive payouts.
33. Daily input list of walk-ins from previous day.
34. Maintain and check **TO DO LIST**.
35. Read **MEMO LOG** daily to ensure strong communication throughout the front office.

**Authority Required:**

Ability to quote rates and make negotiations with guests.

Make decisions to provide guest satisfaction based on “as needed” circumstances.

Authority to process credit card authorization to cover stay plus incidentals figuring at spur of the moment.

### SunStream Hotels and Resorts Guest Service Agent (Continued Page 7 of 7)

#### **Performance Outcomes (Smart Goals) Required:**

1. Ensure Mystery Shopper guidelines are fulfilled
2. Increase repeat guest business by 10% annually
3. Follow up with guests on requests in a timely manner
4. Daily work balances
5. Name mentioned on comment card and team meets its monthly goal for comment card return
6. Complete five up-sells per month

#### **General Standards**

#### **Tasks Required in Sequence:**

1. Adhere to all policies and procedures as outlined in employee handbook
2. Clock in/out accurately for shift as well as lunch periods
3. Maintain professional/clean appearance in complete uniform
4. Attend and participate in all meetings/training sessions as scheduled
5. Complete any other duties as noted by manager/supervisor
6. Must be available for overtime as required.

#### **Authority Required:**

Assigned to a time card and ability to use. Access to employee handbook and company uniform.

#### **Performance Outcomes (Smart Goals) Required:**

1. No missed punches.
2. Follow guidelines set forth in handbook.
3. Arrive to work ready to work in proper attire, presentation and uniform.
4. Meet all deadlines as set forth, attending and participating in all scheduled meetings.
5. Volunteer and assist in cross training efforts.

SunStream Hotels and Resorts  
Maintenance Technician I (Page 1 of 6)

**Accountable to:** Chief Maintenance Engineer

**Accountable for:** Guests and Owners

**Area of Responsibility:** Customer Service and Practice of Daily Essentials

**Time Required:** All Working Hours

**Tasks Required:**

1. I will own and immediately resolve guest complaints to ensure complete guest satisfaction and resolution. I will be responsive to the needs and wishes of our guests, owners and clients.
  - a. When handling a guest complaint, do not blame another person or department; Accept responsibility for the complaint, apologize and give the guest the assurance that you will do what it takes to assist them. Follow through to ensure an appropriate response was offered. Follow-up by speaking to the guest directly or leaving a voicemail message (include your name, date and time) informing them of outcome.
2. I will anticipate the needs of our guests, owners and clients to provide extraordinary experiences, and am empowered to handle the needs of any guest to the best of my ability.
  - a. If a guest asks a question and you are unsure of the answer, reply with “I will find out for you” rather than “I don’t know”. Once you obtain the answer, communicate appropriately to the guest.
3. I will smile and greet every guest in a sincere and professional manner. I will make eye contact and use the guest name at every opportunity.
  - a. If you are busy, acknowledge the guest and let them know you will assist them momentarily.
4. I will maintain a professional appearance and use appropriate language for the workplace, such as “My pleasure”, “I’ll be happy to”, and “Certainly”.
  - a. All personal discussions should be held away from a guest’s earshot. Always remain professional when using the company radios or on a phone call.
  - b. Allow all guests to enter and exit the elevator first. When in an elevator with a guest, inquire about their stay. Keep the conversation on a professional level. When in the elevator with a guest and another employee, keep the focus on the guest or the conversation on a professional level.



### SunStream Hotels and Resorts Maintenance Technician I (Page 2 of 6)

5. I am responsible for providing uncompromising standards of cleanliness at any SunStream property.
6. I will foster innovation, creativity and a culture of passion at work, which will inspire others around me.
7. I am knowledgeable about SunStream's properties and the local community to help answer guest inquiries. I will always recommend the SunStream's food and beverage outlets first.
  - a. Whenever given the opportunity, thank the guest for their business and let them know we appreciate them choosing our resort/restaurant. Then, ask them to come back again.
8. I will practice safe working habits at all times and immediately report accidents and unsafe conditions to my Supervisor.
9. It is my responsibility to know, own and energize SunStream's Vision, Mission & Values and 3 Steps of Service.

#### **VISION**

SunStream will be a premier hotel management and development company by exceeding expectations and capitalizing on opportunities for growth.

#### **MISSION**

We create memorable experiences and fulfill even the unexpressed wishes of those we serve.

#### **VALUES**

- These values guide our thinking, inspire our service and help to direct our efforts, decisions and behavior on a daily basis.
- Consistent Quality Service – We hold ourselves and each other accountable to delivering only the best products and services to our customers.
- Honest, Ethical Behavior – We practice this behavior because it builds confidence and trust in each other and our customers.
- Effective Communication – We communicate to all team members to create a culture of inclusiveness, increase efficiency, satisfy customers and improve quality.
- Respect & Teamwork – We value the differences that make each person unique and we win together by working as a team with mutual respect, trust and open communication.
- Strategic Planning – We set clear goals and explore more efficient and innovative solutions that address competitive challenges.
- Fun! – We work hard. Incorporating fun within our workday keeps us motivated and encouraged to do our very best.

### SunStream Hotels and Resorts Maintenance Technician I (Page 3 of 6)

#### **3 STEPS OF SERVICE**

1. Acknowledge all guests with a smile, eye contact and sincere greeting. Use the guest's name when possible.
  2. Anticipate all guest needs. Inquire, respond, communicate and follow through.
  3. Thank all guests, invite them back and wish them a fond farewell, using the guest's name when possible.
10. I know what the letters in F.I.R.S.T. represent and I understand my role in making SunStream "First in Hospitality".
- Friendly, Innovative, Reliable, Sincere, Team Oriented
  - Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

#### **Main Areas of Responsibility:**

Customer Service

#### **Tasks Required in Sequence:**

1. Make eye contact AND acknowledge all guests, owners and staff and with a warm, sincere smile and a greeting of "Good Morning", "Good Afternoon" or "Good Evening". Use guest/staff name if known. If not known, use "Sir" or "Ma'am".
2. Acknowledge and respond to all guest requests or concerns promptly and efficiently. Inform the guest "I will take care of that for you." Internally provide solutions; make decisions and solicit advice of supervisor when necessary. When listening to a guest concern, do not blame another team member or department, accept responsibility for the complaint, apologize and give the guest confidence that you will do what it takes to assist them. Follow through to ensure an appropriate response was offered. Follow-up by speaking to the guest directly or leaving a voicemail message (include your name, date and time) informing them of outcome.
3. Be direct, polite and simple with guests. If you are unsure of an answer, reply to the guest "I will find out for you" rather than "I don't know". Once you know the answer communicate the results to the guest.

### SunStream Hotels and Resorts Maintenance Technician I (Page 4 of 6)

4. Exceed the guest's expectations by offering information before they need to ask for it.
5. Whenever given the opportunity, thank the guest for their business and let them know we appreciate them staying with us. Then, ask them to come back again.
6. Communicate effectively with fellow employees, passing along information regarding guests with special needs or attention.
7. All personal discussions should be held away from a guest's earshot. Always remain professional when using the company radios or on a phone call.
8. Allow all guests to enter and exit the elevator first. When in an elevator with a guest, inquire about their stay. Keep the conversation on a professional level. When in the elevator with a guest and another employee, keep the focus on the guest or the conversation on a professional level.
9. When servicing a guest, focus all attention on the guest and the guest's needs. If interrupted by a fellow employee, inform the employee you are with a guest and will have to get back to them. Unless the interruption is that of an urgent nature, then explain to the guest the need to assist.
10. Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

#### **Authority Required:**

#### **Performance Outcomes (Smart Goals) Required:**

6. Decrease guest response time by responding to guests' needs the same day.
7. Name mentioned on comment cards at least 5 times per month in a positive manner.
8. Add value to at least one guest per day.

### SunStream Hotels and Resorts Maintenance Technician I (Page 5 of 6)

#### Daily Operations

#### **Tasks Required in Sequence:**

1. Respond to all guest work orders and room calls efficiently and effectively.
2. Complete general repairs in plumbing, electrical and carpentry.
3. Follow up communications with supervisor as necessary.
4. Assist in scheduling all preventative maintenance on air conditioning, refrigeration, water pumps and motors as required.
5. Use proper radio etiquette at all times.
6. Adhere to all safety guidelines and OSHA standards.
7. Test pool and spas twice a day and clean filters as needed as per health department standards.
8. Be proactive and look for areas in need of repair, and report to supervisor.
9. Perform preventative maintenance for all units on arrival and departure daily. This will assist in minimizing maintenance request tickets.
10. Complete owner's checklist for owner units on arrival.
11. Empty all common area recycle boxes.
12. Walk the property and clean up trash throughout the grounds.
13. Empty common area garbage disposals.
14. Perform other duties as assigned by the Chief Maintenance Engineer.
15. All guest call requests communicated via radio to staff will be radioed back to the Front Staff when complete or with an update, so they Front Desk staff may follow up with the guest via a phone call.

#### **Authority Required:**

Authority to carry keys to building and company radio while on duty as well as accessing necessary equipment to complete repairs.

Authority to carry company pager to assist with after-hours owner and guest needs.

#### **Performance Outcomes (Smart Goals) Required:**

1. Increase guest response time by responding to a guest's needs in ten minutes and resolving issue within thirty minutes.
2. Achieve overall score of 85% in the area of "Everything in Suite in Working Order" on guest comment card.
3. Achieve overall score of 95% in the area "Was it Corrected Promptly" on guest comment card.
4. Increased knowledge of building maintenance operations through feedback and annual review from Chief Maintenance Engineer.

SunStream Hotels and Resorts  
Maintenance Technician I (Page 6 of 6)

General Standards

**Tasks Required in Sequence:**

1. Adhere to all policies and procedures as outlined in employee handbook.
2. Clock in/out accurately for shift as well as lunch periods.
3. Maintain professional/clean appearance in complete uniform.
4. Attend and participate in all meetings/training sessions as scheduled.
5. Complete any other duties as noted by manager/supervisor.
6. Must be available for overtime as required.

**Authority Required:**

Assigned to a time card and ability to use. Have in possession an employee handbook and company uniform.

**Performance Outcomes (Smart Goals) Required:**

1. No missed punches. All punches are within seven minutes prior to or after scheduled shift.
2. Follow guidelines set forth in handbook.
3. Arrive to work ready to work in proper attire, presentation and uniform.
4. Meet all deadlines as set forth, attending and participating in all scheduled meetings.
5. Volunteer and assist in cross training efforts.

### SunStream Hotels and Resorts Room Attendants (Page 1 of 5)

Accountable to: Assistant Executive Housekeeper

Main area of responsibility:

1. Customer Service
2. Daily operations
3. General Standards

**Area of Responsibility: Customer Service and Practice of Daily Essentials**

**Tasks Required:**

1. Responsible for knowing and employing all 10 Essentials of Service in daily interactions with every guest and with internal staff.
2. Responsible for knowing and employing SunStream's Vision, Mission and Values and 3 Steps of Service as outline below:

**VISION**

SunStream will be a premier hotel management and development company by exceeding expectations and capitalizing on opportunities for growth.

**MISSION**

We create memorable experiences and fulfill even the unexpressed wishes of those we serve.

**VALUES**

These values guide our thinking, inspire our service and help to direct our efforts, decisions and behavior on a daily basis.

- Consistent Quality Service – We hold ourselves and each other accountable to delivering only the best products and services to our customers.
- Honest, Ethical Behavior – We practice this behavior because it builds confidence and trust in each other and our customers.
- Effective Communication – We communicate to all team members to create a culture of inclusiveness, increase efficiency, satisfy customers and improve quality.
- Respect & Teamwork – We value the differences that make each person unique and we win together by working as a team with mutual respect, trust and open communication.

### SunStream Hotels and Resorts Room Attendants (Page 2 of 5)

- Strategic Planning – We set clear goals and explore more efficient and innovative solutions that address competitive challenges.
- Fun! – We work hard. Incorporating fun within our workday keeps us motivated and encouraged to do our very best.

#### 3. **3 STEPS OF SERVICE**

- Acknowledge all guests with a smile, eye contact and sincere greeting. Use the guest's name when possible.
  - Anticipate all guest needs. Inquire, respond, communicate and follow through.
  - Thank all guests, invite them back and wish them a fond farewell, using the guest's name when possible.
4. Responsible for knowing what the letters in F.I.R.S.T. represent how these action verbs are to be employed with the guests to help make SunStream "First in Hospitality".
- Friendly
  - Innovative
  - Reliable
  - Sincere
  - Team Oriented
5. Make eye contact AND acknowledge all guests/staff with a warm, sincere smile and a greeting of "Good Morning", "Good Afternoon" or "Good Evening". Use guest/staff name if known. If not known, use "Sir" or "Ma'am".
6. Acknowledge and respond to all guest requests or complaints promptly and efficiently. Inform the guest "I will take care of that." Internally provide solutions; make decisions and solicit advice of supervisor when necessary. When taking a guest complaint, do not blame another person or department, accept responsibility for the complaint, apologize and give the guest confidence that you will do what it takes to assist them. Follow through to ensure an appropriate response was offered. Follow-up by speaking to the guest directly or leaving a voicemail message (include your name, date and time) informing them of outcome.
7. Acknowledge and greet all guests that are waiting for assistance. Let them know you will be with them shortly, making eye contact.

### SunStream Hotels and Resorts Room Attendants (Page 3 of 5)

8. Be direct, polite and simple with guests. If you are unsure of an answer, reply to the guest “I will find out for you” rather than “I don’t know”. Once you know the answer communicate the results to the guest.
9. Be consistent with guests and always portray a positive, friendly, professional and polite attitude. Offer assistance “How may I help you?”
10. Exceed the guest’s expectations by offering information before they need to ask for it.
11. Whenever given the opportunity, thank the guest for their business and let them know we appreciate them staying with us. Then, ask them to come back again.
12. Communicate effectively with fellow employees, passing along information regarding guests with special needs or attention.
13. All personal discussions should be held away from a guest’s earshot. Always remain professional when using the company radios or on a phone call.
14. When servicing a guest, focus all attention on the guest and the guest’s needs. If interrupted by a fellow employee, inform the employee you are with a guest and will have to get back to them. Unless the interruption is that of an urgent nature, then explain to the guest the need to assist.
15. All tasks on the am/pm check list need to be completed every day. If there are problems regarding their completion, it should be noted on check list.
16. Allow all guests to enter and exit the elevator first. When in an elevator with a guest, inquire about their stay. Keep the conversation on a professional level. When in the elevator with a guest and another employee, keep the focus on the guest or the conversation on a professional level.
17. Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

#### **Performance Outcomes (Smart Goals) Required:**

1. Increase or maintain guest satisfaction good and excellent responses on comment card scores at 90% or better.
2. Maintain mystery shopper scores at 85% or better.
3. Increase guest response time by responding to a guest’s need the same day.
4. Add value to at least one guest per day.



### SunStream Hotels and Resorts Room Attendants (Page 4 of 5)

#### **Main Areas of Responsibility:**

Area of Responsibility: Daily Operations:

1. Clean all guest rooms assigned, services and checkouts, according to established standards and procedures.
2. Report damage or problems in all rooms to your supervisor in a timely manner.
3. Replace any missing items and/or supplies as needed.
4. Responsible for using chemicals, supplies and equipment properly and safely according to package directions and MSDS recommendations.
5. Attend all scheduled housekeeping shift and quarterly meetings.
6. All lost and found items are to be turned into your supervisor in a timely manner.
7. Assist with special procedures as needed.
8. Keep closets and housekeeping cart neat and tidy to ensure efficiency in room cleaning processes.

**Authority Needed:** Access to equipment and supplies.

#### **Performance Outcomes (Smart Goals) Required:**

1. Not to be recalled back to a room more than \_\_\_\_ (property to fill in) time(s) per week .
2. Maintain mystery shopper scores at 85% or higher.
3. Increase guest response time by responding to a guest's needs in ten minutes and resolving issue with in thirty minutes.

#### **Main Areas of Responsibility:**

##### **General Standards**

#### **Tasks Required in Sequence:**

1. Adhere to all policies and procedures as outlined in employee handbook
2. Clock in/out accurately for shift as well as lunch periods
3. Maintain professional/clean appearance in complete uniform
4. Attend and participate in all meetings/training sessions as scheduled
5. Complete any other duties as noted by manager/supervisor
6. Must be available for overtime as required.

#### **Authority Required:**

- Assigned to a time card and ability to use computer for clocking in and out each day.
- Access to employee handbook and company uniform.

SunStream Hotels and Resorts  
Room Attendants (Page 5 of 5)

**Performance Outcomes (Smart Goals) Required:**

1. No missed punches.
2. Follow guidelines set forth in handbook.
3. Arrive to work ready to work in proper uniform, with name tag and appropriate shoes.
4. Meet all deadlines as set forth, attending and participating in all scheduled meetings.
5. Volunteer and assist in cross training efforts.

**Position Requirements:**

1. Must be able to walk, stand, kneel, bend, and twist during majority of working hours.
2. Must be able to lift up to 25 lbs. unassisted.
3. Must be able to lift arms overhead.
4. Must be able to work with/near cleaning chemicals.
5. Must wear non-slip shoes at all times while working.

### SunStream Hotels and Resorts Line Cook (Page 1 of 10)

**Accountable to: General Manager, Assistant General Manager, Executive Chef, Sous-chef, Restaurant Manager, Restaurant Supervisor**

**Accountable for: Food prep, Food quality and consistency, cleanliness of kitchen,**

#### **Main Areas of Responsibility:**

- A. General Customer Service
- B. Telephone Etiquette and Operations
- C. Control of all food related items
- D. To ensure the guests have a pleasant dining experience using the guidelines set by Bellasera Hotel
- E. To maintain a clean and safe work environment in the kitchen.
- F. To perform daily opening, closing, and side duties.
- G. General food preparation and rotation of stock

**Area of Responsibility: Customer Service and Practice of Daily Essentials**

#### **Tasks Required:**

1. I will own and immediately resolve guest complaints to ensure complete guest satisfaction and resolution. I will be responsive to the needs and wishes of our guests, owners and clients.
  - a. When handling a guest complaint, do not blame another person or department; Accept responsibility for the complaint, apologize and give the guest the assurance that you will do what it takes to assist them. Follow through to ensure an appropriate response was offered. Follow-up by speaking to the guest directly or leaving a voicemail message (include your name, date and time) informing them of outcome.
2. I will anticipate the needs of our guests, owners and clients to provide extraordinary experiences, and am empowered to handle the needs of any guest to the best of my ability.
  - a. If a guest asks a question and you are unsure of the answer, reply with “I will find out for you” rather than “I don’t know”. Once you obtain the answer, communicate appropriately to the guest.
3. I will smile and greet every guest in a sincere and professional manner. I will make eye contact and use the guest name at every opportunity.
  - a. If you are busy, acknowledge the guest and let them know you will assist them momentarily.
4. I will maintain a professional appearance and use appropriate language for the workplace, such as “My pleasure”, “I’ll be happy to”, and “Certainly”.
  - a. All personal discussions should be held away from a guest’s earshot. Always remain professional when using the company radios or on a phone call.

### SunStream Hotels and Resorts Line Cook (Page 2 of 10)

- b. Allow all guests to enter and exit the elevator first. When in an elevator with a guest, inquire about their stay. Keep the conversation on a professional level. When in the elevator with a guest and another employee, keep the focus on the guest or the conversation on a professional level.
- 5. I am responsible for providing uncompromising standards of cleanliness at any SunStream property.
- 6. I will foster innovation, creativity and a culture of passion at work, which will inspire others around me.
- 7. I am knowledgeable about SunStream's properties and the local community to help answer guest inquiries. I will always recommend the SunStream's food and beverage outlets first.
  - a. Whenever given the opportunity, thank the guest for their business and let them know we appreciate them choosing our resort/restaurant. Then, ask them to come back again.
- 8. I will practice safe working habits at all times and immediately report accidents and unsafe conditions to my Supervisor.
- 9. It is my responsibility to know, own and energize SunStream's Vision, Mission & Values and 3 Steps of Service.

#### **VISION**

SunStream will be a premier hotel management and development company by exceeding expectations and capitalizing on opportunities for growth.

#### **MISSION**

We create memorable experiences and fulfill even the unexpressed wishes of those we serve.

#### **VALUES**

These values guide our thinking, inspire our service and help to direct our efforts, decisions and behavior on a daily basis.

- 10. Consistent Quality Service – We hold ourselves and each other accountable to delivering only the best products and services to our customers.
- 11. Honest, Ethical Behavior – We practice this behavior because it builds confidence and trust in each other and our customers.
- 12. Effective Communication – We communicate to all team members to create a culture of inclusiveness, increase efficiency, satisfy customers and improve quality.
- 13. Respect & Teamwork – We value the differences that make each person unique and we win together by working as a team with mutual respect, trust and open communication.

### SunStream Hotels and Resorts Line Cook (Page 3 of 10)

14. Strategic Planning – We set clear goals and explore more efficient and innovative solutions that address competitive challenges.
15. Fun! – We work hard. Incorporating fun within our workday keeps us motivated and encouraged to do our very best.

#### **3 STEPS OF SERVICE**

16. Acknowledge all guests with a smile, eye contact and sincere greeting. Use the guest's name when possible.
  17. Anticipate all guest needs. Inquire, respond, communicate and follow through.
  18. Thank all guests, invite them back and wish them a fond farewell, using the guest's name when possible.
19. I know what the letters in F.I.R.S.T. represent and I understand my role in making SunStream "First in Hospitality".
    - a. Friendly, Innovative, Reliable, Sincere, Team Oriented
    - b. Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

#### **1st Main Area of Responsibility:**

##### **A) General Customer Service**

#### **Tasks Required in Sequence:**

1. Make eye contact AND acknowledge all guests/staff with a warm, sincere smile and a greeting of "Good Morning", "Good Afternoon", or "Good Evening". Use guest/staff name if known. If not known, use "Sir" or "Ma'am".
2. Acknowledge and respond to all guest requests or complaints promptly and efficiently. Inform the guest "I will take care of that." Internally provide solutions; make decisions and solicit advice of supervisor when necessary. When taking a guest complaint, do not blame another person or department, accept responsibility for the complaint, apologize and give the guest confidence that you will do what it takes to assist them. Follow up.
3. Acknowledge and greet all guests that are waiting for assistance. Let them know you will be with them shortly, making eye contact.
4. Be direct, polite and simple with guests. If you are unsure of an answer, reply to the guest "I will find out for you" rather than "I don't know". Once you know the answer communicate the results to the guest.
5. Portray a positive, friendly, professional, and polite attitude. Offer assistance "How may I help you?"

### SunStream Hotels and Resorts Line Cook (Page 4 of 10)

6. Whenever given the opportunity, thank the guest for their business and let them know we appreciate them staying with us. Then, ask them to come back again.
7. Communicate effectively with fellow employees, passing along information regarding guests with special needs or attention.
8. All personal discussions should be held away from a guest's earshot. Always remain professional when using the company radios or on a phone call.
9. Allow all guests to enter and exit the elevator first. When in an elevator with a guest, inquire about their stay. Keep the conversation on a professional level. When in the elevator with a guest and another employee, keep the focus on the guest or the conversation on a professional level.
10. When servicing a guest, focus all attention on the guest and the guests needs. If interrupted by a fellow employee, inform the employee you are with a guest and will have to get back to them. Unless the interruption is that of an urgent nature, then explain to the guest the need to assist.
11. Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

#### **Authority Required:**

#### **Performance Outcomes (Smart Goals) Required:**

1. Increase or maintain guest satisfaction good and excellent responses on comment card scores at 95% or better.
2. Maintain mystery shopper scores at 95%
3. Increase guest response time by responding to a guest's need the same day.

#### **2nd Main Areas of Responsibility:**

##### **B) Telephone Etiquette and Operations.**

#### **Tasks Required in Sequence:**

1. When answering the telephone, always start with "Good morning, Kitchen, \_\_\_\_\_ speaking, how may I help you?" Or, if guest name displayed, "Good Morning Mr. Smith, this is \_\_\_\_\_ speaking, how may I help you?"
2. Never be informal when answering the telephone, you never know who is on the other end.
3. When taking reservations for special events ensure a credit card number is obtained to hold a seat.
4. The information needed when taking a reservation is as follows: **DATE OF RESERVATION, NAME, and NUMBER OF PEOPLE, PHONE NUMBER, TIME OF RESERVATION & SPECIAL REQUEST.**

### SunStream Hotels and Resorts Line Cook (Page 5 of 10)

5. Never guarantee a window table to our guests but always consider their request and do your best to accommodate them. (Let our guests know that we will do our best to accommodate their wishes)

#### **Performance Outcomes:**

1. Have a profitable restaurant where the guests want to come and dine
2. Increased positive comment cards through positive communication skills.

#### **3rd Main Area of Responsibility:**

##### **C) Control of all food related items**

#### **Tasks Required in Sequence:**

1. Always make sure that food being prepared is food ordered by checking the tickets and preparing that meal accordingly to menu book specifications. If necessary check the drop line report sheets that are in the menu spec book to determine what each dish consists of and what type a plate presentation is soothingly aesthetic
2. Always cook only the amount of food that is necessary, unless duplicate tickets have come in and it makes sense to create a larger batch.
3. Never make food without a ticket
4. Do not cook food for staff members, as there is a current “half price” policy in effect for any food they would like to eat; if however there is left over banquet food available this food may be allowed to be eaten at the Chef’s discretion.
5. Ensure that food is cooked and held at proper temperatures within Health Department guidelines, and to the guests request. Always make sure that the proper sides and condiments are served with the appropriate main course.

#### **Performance Outcomes:**

1. Ensuring the guest receives superior service
2. Ensuring guest does not wait for any extended period

#### **4th Main Areas of Responsibility:**

**D) To ensure the guests have a pleasant dining experience using the guidelines set by BellaSera Hotel, and SunStream Hotels and Resorts.**

#### **Tasks Required in Sequence:**

1. To follow the opening procedures established to make sure all supplies and product is on hand and ready to go

### SunStream Hotels and Resorts Line Cook (Page 6 of 10)

2. To know all menu food items for all outlets to be helpful in answering all questions
3. Check with the Servers for firing times and open food tickets to ensure that they get the food they wanted if it is different from what they ordered
4. Conduct a pre shift meeting for specials and any other helpful information
5. Be on the line at all hours that the restaurant is open for business and be prepared to be busy accordingly upon the night of the week, Hotel occupancy, and Reservation book.

#### **Authority Needed:**

1. Have excellent menu knowledge and a working knowledge of food in general
2. Able to pull the supplies needed to work the shift
3. Authority to do whatever is necessary to please the guest.

#### **Performance Outcomes:**

1. Have a profitable restaurant where the guests want to come and dine
2. Make additional money in bonus incentives within guidelines of new program
3. Increased positive comment cards

#### **5th Main Area of Responsibility:**

##### **E) To maintain a clean and well-organized work environment in the kitchen.**

#### **Tasks Required in Sequence:**

1. Ensure there are adequate supplies to service the shift, all menu items are in stock, all preparation for the shift has been completed, all equipment is on and working properly.
2. Clean as you prep, put away any food that is not being used, efficiently see that all dirty utensils and dishes get to the dish station when finished using them.
3. When not busy, be self initiated to clean whatever needs to be cleaned i.e. fryers, walls, ovens, walk-ins, work stations, do not wait until the end of the shift to do routine cleaning.
4. Break down all boxes before putting in the recycling bin,
5. Clean and arrange stockrooms and walk ins whenever possible working in the First In First out line of logic.
6. Clean and wipe down all work surfaces before leaving shift do not leave the kitchen dirty for the following shift.
7. Inform the stewards of any thing needing to be deep cleaned, and insure that all spills and messes are cleaned up off of the floor as they occur. Never leave anything lying around that someone can slip, or fall on.
8. Remember, there is always something that needs to be cleaned or advance preparation of food for the next shift that needs to be completed.
9. All soiled linen should be put in linen bag.



### SunStream Hotels and Resorts Line Cook (Page 7 of 10)

10. When taking soiled dishware to the dish station, all used food and paper product will go in waste can or recycling bin.
11. All dirty silverware will go into the bus pan
12. All coffee cups will be placed in the coffee cup rack
13. All plates will be stacked neatly on the dish counter according to the size of the plates.
14. Make sure that all equipment is turned off at the end of each shift and that all dirty dishes have been taken to the dish station.

#### **Authority Needed:**

1. Access to all supplies in the storage areas.
2. Ability To Know When Product is low and write down on ordering board for chef or sous-chef to order.
2. Able to adjust the par with a Managers approval to either change it to correlate with business levels or to adjust it so it is correct if it is wrong.

#### **Performance Outcomes:**

1. Having the product on hand you need to do your job will make you a more efficient and productive worker.
2. Having a clean working environment will cut down on accidents
3. Working in a clean environment will create good Health inspections.
4. Working in a clean atmosphere will eliminate any food contamination.

### **6th Main Area of Responsibility:**

#### **F) To perform daily opening, closing and side duties**

##### **Tasks Required in Sequence:**

##### **1) A.M. Opening side Duties:**

- a) Turn on all Restaurant lights. Check reservations and Occupancy level to.  
Plan for the day
- b) Turn on vents and lights over equipment
- c) Turn on all ovens necessary for the shift, if you don't need to use something . .  
do not turn it on as this will cut down on costs.
- d) Turn on the Grill, Steamer, and Heat lamps.
- e) Do a brief line check to make sure you have every thing you need for shift and check all products for freshness by sight, taste, or smell. If anything must be discarded write product description and quantity on waste sheet.
- f) Get supplies from walk ins prior to opening time to secure items required for shift. If out of anything write item out of on order board so it may be purchased.
- g) Inform servers and day time supervisor of any outages or 86's.
- h) Perform any prep that needs to be completed for smooth operation of shift when complete, focus attention to advance prep for next day.

### SunStream Hotels and Resorts Line Cook (Page 8 of 10)

- i) Perform any work that is required for amenities or BEO's in order to assist other team members in the completion of their duties.
- j.) Check all overnight plates for freshness and replace where necessary, write down on waste sheet all quantity of items that are discarded and date
- k) When breakfast shift is completed wrap, label and day dot all prep for freshness.
- l) Properly clean all surfaces, take all dirty dishes, pans, etc. to dish station.
- m) Punch out and have a nice day.

#### **P.M. Opening side Duties:**

- a) Check reservation book and occupancy level to plan your night.
- b) Take out and heat all sauce work that is needed for the shift.
- c) Check prep levels to insure that all food on the menus can be made in the quickest amount of time possible without having to scramble for prep.
- d) Make a list of all food item required that need to be prepped and acquired all necessary food items from either the stockrooms or the walk ins.
- e) Do the prep work required based upon business levels from earlier research.
- f) Inform the Manager on duty of any outages or 86's.
- g) Perform a line up prior to opening of shift, with an example of the daily specials if something not ran on special before. Always have a food item available for sample and to discuss.
- h) Cook all food to recipe specs or to order based upon the customers preferences, at either rate make sure that all food is served at the proper temperature.
- i) Throughout course of shift keep up on kitchen cleanliness, when not busy find something to do whether it be cleaning of equipment, preparation of food for the next day, or helping teammates by working on BEO list on the back board.
- j) At end of shift wrap, label, and day dot all food and tightly wrap according to temperature, if hot leave a slit in the plastic to allow heat to escape. Secure all fish and meat products from line on speed rack in walk in designated for p.m. prep.
- k) Clean and sanitize all work surfaces.
- l) Take all dirty dishes, pans, and utensils to dish station. This should also include all cutting boards and knives in order for proper sanitation and sterilization.
- m) Make sure all equipment is properly turned off, check twice if necessary.
- n) Sweep and mop kitchen floor and walk ins including front line and back line, under and behind all equipment.
- n) Punch out and have a nice night.

#### **Authority Needed:**

1. Able to ask for tools needed.
2. Able to request more training when needed.
3. Able to make prep list.
4. Able to requisition food for shift, and have the ability to locate.

SunStream Hotels and Resorts  
Line Cook (Page 9 of 10)

**Performance Outcomes:**

1. We will always ensure we have the tools needed to carry out our daily service

**7th Main Area of Responsibility:**

**G) General Food Preparation and rotation of stock**

**Tasks Required in Sequence:**

1. Always prepare food to menu specs
2. Never overcook the food
3. Does the food look presentable on the plate
4. Are the right vegetables and starch with the food
5. Does the food ordered match up with the food cooked.
6. Always rotate stock as it arrives, First In First Out
7. Never use substandard looking product
8. Check food for freshness, smell, taste, touch, visually inspect
9. If the food is unusable, document this on the food waste chart
10. Inform supervisor of bad products as they arrive
11. Always keep a well organized system for storing food products
12. Never use new products before ones from previous orders

**Authority Needed:**

**Performance Outcomes:**

1. We will always ensure we have the tools needed to carry out our daily service

**Core Competencies/Skills:**

General culinary knowledge. Ability to multitask Ability to perform on own, be self initiated. Professional attitude and ability to work various stations, to include pantry, sauté. Safe knife handling skills, proper knowledge of Health department regulations covering food and all aspects of food handling. Able to identify fresh product from unusable product. Knowledge of proper sanitation,

**Career Stoppers:**

Not being friendly or nice to the guests, not fast enough to give good service,  
Not having the job knowledge to carry out a superior level of service to guests.  
Not being organized

SunStream Hotels and Resorts  
Line Cook (Page 10 of 10)

**Education/Experience Level:**

2 or 3 years of previous culinary experience in related areas pertaining to position hired for or a degree from a recognized Culinary School. Candidates should demonstrate a basic working knowledge of food cost, plate presentation, and sauce work. Knowledge of different styles of cuisine are also important and the desire to be creative and artistic when working with food is very important. Should be highly motivated in the field as a career, not just a paycheck, this will clearly show, through the way one handles oneself in the kitchen as well as what one does to further their culinary abilities once hired. Finally, person in this role should be a self-starter, requiring a minimal amount of supervision.

**Position Requirements:**

1. Must be able to stand, sit or walk for extended periods of time.
2. Must be able to lift up to 30 pounds.

### SunStream Hotels and Resorts Server (Page 1 of 12)

**Accountable to:** F&B Supervisor  
**Accountable for:** Individual and Team duties and responsibilities

#### **Main Areas of Responsibility:**

- A. General Customer Service
- B. Telephone Etiquette and Operations
- C. Greeting and Seating Guests
- D. To ensure the guests have a pleasant dining experience using the guidelines set by Diamond Head Beach Resort
- E. To maintain a clean and safe work environment in the restaurant
- F. To perform daily opening, closing and side duties
- G. General F&B Housekeeping Tasks

**Area of Responsibility:** Customer Service and Practice of Daily Essentials

#### **Tasks Required:**

1. I will own and immediately resolve guest complaints to ensure complete guest satisfaction and resolution. I will be responsive to the needs and wishes of our guests, owners and clients.
  - When handling a guest complaint, do not blame another person or department; Accept responsibility for the complaint, apologize and give the guest the assurance that you will do what it takes to assist them. Follow through to ensure an appropriate response was offered. Follow-up by speaking to the guest directly or leaving a voicemail message (include your name, date and time) informing them of outcome.
2. I will anticipate the needs of our guests, owners and clients to provide extraordinary experiences, and am empowered to handle the needs of any guest to the best of my ability.
  - If a guest asks a question and you are unsure of the answer, reply with “I will find out for you” rather than “I don’t know”. Once you obtain the answer, communicate appropriately to the guest.
3. I will smile and greet every guest in a sincere and professional manner. I will make eye contact and use the guest name at every opportunity.
  - If you are busy, acknowledge the guest and let them know you will assist them momentarily.

### SunStream Hotels and Resorts Server (Page 2 of 12)

4. I will maintain a professional appearance and use appropriate language for the workplace, such as “My pleasure”, “I’ll be happy to”, and “Certainly”.
  - All personal discussions should be held away from a guest’s earshot. Always remain professional when using the company radios or on a phone call.
  - Allow all guests to enter and exit the elevator first. When in an elevator with a guest, inquire about their stay. Keep the conversation on a professional level. When in the elevator with a guest and another employee, keep the focus on the guest or the conversation on a professional level.
5. I am responsible for providing uncompromising standards of cleanliness at any SunStream property.
6. I will foster innovation, creativity and a culture of passion at work, which will inspire others around me.
7. I am knowledgeable about SunStream’s properties and the local community to help answer guest inquiries. I will always recommend the SunStream’s food and beverage outlets first.
  - Whenever given the opportunity, thank the guest for their business and let them know we appreciate them choosing our resort/restaurant. Then, ask them to come back again.
8. I will practice safe working habits at all times and immediately report accidents and unsafe conditions to my Supervisor.
9. It is my responsibility to know, own and energize SunStream’s Vision, Mission & Values and 3 Steps of Service.

#### **VISION**

SunStream will be a premier hotel management and development company by exceeding expectations and capitalizing on opportunities for growth.

#### **MISSION**

We create memorable experiences and fulfill even the unexpressed wishes of those we serve.

#### **VALUES**

These values guide our thinking, inspire our service and help to direct our efforts, decisions and behavior on a daily basis.

### SunStream Hotels and Resorts Server (Page 3 of 12)

- Consistent Quality Service – We hold ourselves and each other accountable to delivering only the best products and services to our customers.
- Honest, Ethical Behavior – We practice this behavior because it builds confidence and trust in each other and our customers.
- Effective Communication – We communicate to all team members to create a culture of inclusiveness, increase efficiency, satisfy customers and improve quality.
- Respect & Teamwork – We value the differences that make each person unique and we win together by working as a team with mutual respect, trust and open communication.
- Strategic Planning – We set clear goals and explore more efficient and innovative solutions that address competitive challenges.
- Fun! – We work hard. Incorporating fun within our workday keeps us motivated and encouraged to do our very best.

#### **3 STEPS OF SERVICE**

1. Acknowledge all guests with a smile, eye contact and sincere greeting. Use the guest's name when possible.
2. Anticipate all guest needs. Inquire, respond, communicate and follow through.
3. Thank all guests, invite them back and wish them a fond farewell, using the guest's name when possible.
10. I know what the letters in F.I.R.S.T. represent and I understand my role in making SunStream "First in Hospitality".
  - a. Friendly, Innovative, Reliable, Sincere, Team Oriented
  - b. Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest or informing them to have a great day. Please refer to your specific department guidelines for standard answer.

#### **1<sup>st</sup> Main Area of Responsibility:**

##### **A) General Customer Service**

##### **Tasks Required in Sequence:**

1. Make eye contact AND acknowledge all guests/staff with a warm, sincere smile and a greeting of "Good Morning", "Good Afternoon" or "Good Evening". Use guest/staff name if known. If not known, use "Sir" or "Ma'am".

### SunStream Hotels and Resorts Server (Page 4 of 12)

2. Acknowledge and respond to all guest requests or complaints promptly and efficiently. Inform the guest “I will take care of that.” Internally provide solutions; make decisions and solicit advice of supervisor when necessary. Do not blame another person or department, accept responsibility for the complaint, apologize and give the guest confidence that you will do what it takes to assist them. Follow-up by speaking to the guest directly or leaving a voice message (include your name, date and time) informing them of outcome.
3. Acknowledge and greet all guests that are waiting for assistance. Make eye contact and let them know you will be with them shortly.
4. Be direct, polite and simple with guests. If you are unsure of an answer, inform the guest “I will find out for you” rather than “I don’t know”. Once you know the answer inform the guest promptly.
5. Be consistent with guests.
6. Portray a positive, friendly, professional and polite attitude. Offer assistance “How may I help you?”
7. Exceed the guest’s expectations by offering information before they need to ask for it. Observe the guests and their body language ie rushed, relaxed, and private?
8. Whenever given the opportunity, thank the guest for their business and let them know we appreciate them dining with us. Then, ask them to come back again.
9. Communicate effectively with fellow employees, passing along information regarding guests with special needs or attention.
10. All personal discussions should be held away from a guest’s earshot. Always remain professional when using the company radios or on a phone call.
11. Allow all guests to enter and exit the elevator first. When in an elevator with a guest and/or another employee, **keep the focus on the guest and keep the conversation on a professional level.**
12. Focus all attention on the guest and the guests needs. If interrupted by a fellow employee, inform the employee you are with a guest and will have to get back to them. Unless the interruption is that of an urgent nature, then explain to the guest the need to assist.
13. Answer all phones within three rings. Speak warmly and sincerely. Finish the call by thanking the guest and informing them to have a great day.

#### **Authority Required:**

1. Authority to do whatever is necessary to please the guest.

#### **Performance Outcomes (Smart Goals) Required:**

5. Ensure all guests receive excellent customer service as measured by repeat business, comment cards, supervisory and peer comments.
6. Ensure responses to guest needs are satisfied immediately.



### SunStream Hotels and Resorts Server (Page 5 of 12)

#### 2<sup>nd</sup> Main Areas of Responsibility:

##### **B) Telephone Etiquette and Operations.**

##### **Tasks Required in Sequence:**

1. When answering the telephone, always start with “Good morning, Chloe’s Restaurant, \_\_\_\_\_ speaking, how may I help you?” Or, if guest name displayed, “Good Morning Mr. Smith, this is \_\_\_\_\_ speaking, how may I help you?”
2. Always be formal when answering the telephone, you never know who is on the other end.
3. Only take reservations in Chloe’s Restaurant for Dinner (5:00pm until 9:00 or 9:30pm) and for our Sunday brunch.
4. When taking reservations for special events ensure a credit card number is obtained to hold a seat.
5. The information needed when taking a reservation is as follows: **DATE OF RESERVATION, NAME and NUMBER OF PEOPLE, PHONE NUMBER, TIME OF RESERVATION & SPECIAL REQUEST.**
6. Never guarantee a window table to our guests but always consider their request and do your best to accommodate them. (Let our guests know that we will do our best to accommodate their wishes)
7. The Terrace can be used for larger parties, up to 120 people. These reservations are to be taken by the Supervisor on duty or Catering Manager ONLY. In the case that you must take the reservation, follow the standard reservation format and include the following information: guest name, phone number, how it is to be billed, table set up and any other special food & beverage requirements. Inform the Supervisor or Catering Manager so they may follow-up directly with the party. At any time, the Buffet should always be sold to groups larger than 20 pax.
8. If you ever need to interrupt your conversation, ask a question or find a person, ALWAYS put the caller on hold.
9. Always check the list of Hotel extension numbers posted on the inside door of the Host stand closet.
10. Messages should always be taken and written on paper. These messages should then be inserted into the proper box by the phone at the host stand.

##### **Authority Required:**

1. Authority to do what is necessary to please the guest

##### **Performance Outcomes:**

1. Ensure the guests’ first impression is memorable and positive.
2. Information is communicated clearly and consistently ensuring accurate reservations.

### SunStream Hotels and Resorts Server (Page 6 of 12)

#### **3<sup>rd</sup> Main Area of Responsibility:**

##### **C) Greeting and Seating guests.**

###### **Tasks Required in Sequence:**

1. Greet the guest at the door with a smile and a warm cordial welcome. If you are unable to seat the guests, acknowledge that you have seen them and communicate that someone will be right with them. Pass on this information to your supervisor.
2. Ask the guest how many are in the party and whether they would prefer (if weather permitting) an indoor or outdoor table.
3. Pick up as many menus as there are people and lead them up to a fully set table. Do not wave to them from a section and ask them to come up on their own.
4. Pull each chair out from the table and lay a menu on each corner of the roll up.
5. Seat each guest down and inform them of the soup and/or special of the day (if appropriate meal period).
6. Clear away extra place settings at this time.
7. Communicate the seating to the respective server.
8. Do not stock all the customers in one specific section. Spread them out throughout the dining room, depending on how many sections there are at that time.
9. Wish the guests an enjoyable meal and tell them that their server will be with them right away.
10. Make sure you know whom the server is and use that employee's name with the guest.

###### **Authority Required:**

1. Authority to do what is necessary to please the guest

###### **Performance Outcomes:**

1. Ensure guest needs are met and exceeded with a positive and friendly behavior.
2. Ensure the guest is greeted or acknowledged with a smile and nod within 30 seconds of arrival.

### SunStream Hotels and Resorts Server (Page 7 of 12)

#### **4<sup>th</sup> Main Areas of Responsibility:**

**D) To ensure the guests have a pleasant dining experience using the guidelines set by DiamondHead All Suite Beach Resort.**

#### **Tasks Required in Sequence:**

1. Follow the opening procedures established to make sure all supplies and product is on hand and ready to go
2. Know the menu and drinks to be helpful in answering all questions
3. Check with the host/ess to know your section
4. Attend the pre shift meeting for specials and any other helpful information
5. Be on the floor when the restaurant is open to greet all the guests
6. Approach your tables within 3 minutes of them being seated, greet them pleasantly and explain daily specials, this is a good time to mention some appetizers to upsell and offer to bring them a beverage.
7. Upselling is an excellent opportunity to increase the guest check resulting in a larger tip for the server. Take the time to clearly describe specials, recommend bottles of wine, etc to the guest.
8. After delivering beverages ask if they have any questions and offer to take the order, be sure to write it down as you go.
9. Be knowledgeable of questions to ask while taking the order such as temperatures, salad dressings, appropriate starches
10. After the order is taken enter into the POS system and pick up the salads, garnish them correctly with almonds and fried sliced pineapples
11. Deliver the salads serving the ladies first, offer drink refills always keeping an eye on the water glass and bread baskets
12. Check back with the table when they finish the salads clear the plates, check to be sure they have all the silverware they will need for the next course and if necessary replace what they need and check beverages and tell them their dinners will be out soon.
13. Go to the kitchen and check on the entrees if they are all ready pull them down one by one and garnish with lemons and appropriate sauces
14. Put them on a tray and deliver them to the table
15. Serve each guest what he or she ordered checking your notes if you need to and always make sure the entrée faces the guest.
16. Check back with the guests after they have taken 2 to 3 bites to be sure they have everything and they do not need anything additional
17. Remain visible on the floor to the guests
18. When the guests are done eating approach the table and ask if you may clear the plates. If they agree start clearing to the right of each guest. After all the entrée plates are gone pick up any unused glassware, the breadbasket, the butter and the B&B plates.
19. Now is the time to offer dessert and coffee. You need to describe the desserts to them and offer coffee.

### SunStream Hotels and Resorts Server (Page 8 of 12)

20. If they want coffee, go back to the kitchen and get the cups and creamers. Fill the cups with coffee or decaf and return to the table. Be sure to add everything they order to the check.
21. Prepare the check by printing it and checking to be sure everything they ordered is on the check. Put it in a check presenter and take it to the table. Offer to return to pick it up shortly.
22. When the guest has put either a credit card or cash in the book pick it up and process. If they have any coupons or entertainment cards apply the discount to the check and show the guest the new total. If paying by cash bring them the correct change and if by credit card run the card through the Squirrel system and wait for the approval. Return to the table with either the change or the receipt from the credit card. Thank the guest for dining with us and ask them to please return.
23. This is a step-by-step procedure for one table. Most likely you will have 3 to 5 tables at the same time, all in different stages of this scenario, so you must be organized and able to do many steps at the same time.

#### **Authority Required:**

1. Have aloha number and be trained on how to use the system
2. Able to pull the supplies needed to work the shift
3. Authority to do what is necessary to please the guest.

#### **Performance Outcomes:**

1. Earn additional money in tips with satisfied guests and higher checks due to upselling.
2. Ensure superior customer service by greeting guests within 3 minutes, positive comment cards, repeat business and mystery shoppers.
3. Sign up 10 guests per week on the Repeat Guest Program.
4. Ensure prompt, friendly and unobtrusive table maintenance throughout the meal.

#### **5<sup>th</sup> Main Area of Responsibility:**

##### **E) To maintain a clean and well-organized work environment in the restaurant.**

#### **Tasks Required in Sequence:**

1. Ensure there are adequate supplies to service the shift, i.e. cutlery, napkins, mop towels, condiments, vacuum, candle oil, serving trays, etc.
2. Empty glasses, bottles, etc will be promptly removed or replenished during the dining experience. Remember, there is always something to take into the kitchen and back. Never go empty handed.
3. A dirty table will be bussed and cleaned as soon as the guests leave the restaurant.
4. All items will be removed from the table and put on a tray to be taken immediately to the kitchen.
5. All soiled glassware will be picked up by the stem of the glass and placed on the tray. Always hold tray in hand when cleaning tables.
6. The entire table must be wiped down with a clean rag.
7. All condiments will be put back on the table and new place settings put in place.

### SunStream Hotels and Resorts Server (Page 9 of 12)

8. All chairs at table will be brushed down and straightened at table.
9. Always clear table completely and set to completion.
10. All soiled linen should be put in linen bag near kitchen entrance.
11. When taking soiled dishware into kitchen, all used food and paper product will go in waste can or recycling bin.
12. All dirty silverware will go into the bus pan
13. All coffee cups will be placed in the coffee cup rack
14. All plates will be stacked neatly on the dish counter according to the size of the plates.
15. The carpet around the table will be vacuumed for crumbs and spills.

#### **Authority Required:**

1. Access to all supplies in the storage areas.
2. Ability to order the supplies needed to maintain the pars.
3. Able to adjust the par with a Managers approval to either change it to correlate with business levels or to adjust it so it is correct if it is wrong.

#### **Performance Outcomes:**

1. All supplies are stocked prior to shift
2. Ensure work area is clean, tidy and prepared
3. Ensure empty glasses, cups, dishes, etc are removed or replenished within 3 minutes

### **6<sup>th</sup> Main Area of Responsibility:**

#### **F) To perform daily opening, closing and side duties**

##### **Tasks Required in Sequence:**

##### **1) A.M. Opening side Duties:**

- a) Turn on all Restaurant lights. Check reservations and Occupancy level to plan for the day.
- b) Get ice from machine in kitchen and fill the juice trough.
- c) Set up coffee station. Make coffee and decaf. as per occupancy.
- d) Set up bread station. Start toaster.
- e) Ensure adequate supply of orange juice, milk, bread, maple syrup etc. and replacement stock in service fridge.
- f) Make sure you have butter plates and ramekins ready.
- g) Place syrups, creamers, butters, and jellies on all tables
- h) Server station must be stocked with 1 thermos of cream, regular coffee, decaf., and Orange, apple, grapefruit and cranberry juices.
- i) Ensure the side station is stocked with roll-ups, coffee spoons, knives, forks, soup spoons, 2 cloths, coffee cups & saucer, water glasses, wine glasses and cream containers.
- j) All tables must be clean and properly set. Please report any problems to the supervisor. You are responsible for how the tables in the restaurant are for the start of the day.

### SunStream Hotels and Resorts Server (Page 10 of 12)

- k) Check all high chairs for cleanliness
- l) Roll 50 silverware roll-ups
- m) Be ready to open 10 minutes prior to opening time

#### **2) A.M. Closing side Duties:**

- a) Clean all tables and floor
- b) Reset section as best as possible, restocking sugar, salt, pepper, saucers and cups.
- c) Clean kitchen by wiping down counters, throwing out garbage and tidying shelves.
- d) Check coffee area and clean coffee gutters.
- e) Empty and replace linen bag. Bring all recycling to designated spot (if applicable)
- f) Make sure station is clean and wiped down
- g) Check service fridge and clean
- h) Stock station with cups, saucers, side plates, etc.
- i) Return unused items to kitchen.
- j) Take read and record due backs.
- k) Check with supervisor and if nothing else is required, sign out.

#### **3) P.M. Opening side Duties:**

- a) Check reservation book and occupancy level to plan your night.
- b) Check all tables to make sure each is set fully and properly.
- c) Check service station area to make sure cups, saucers, side plates, water glasses, wineglasses, cutlery, roll-ups, and damp cloths are fully stocked.
- d) Do a quick scan of the floor in each section, picking up any paper or garbage that may be lying around.
- e) Fill ice bin
- f) Prep butter on B&B's: 4 trays of 2's, 3's, and 4's
- g) Cut lemons for water and fish and prep bread baskets
- h) Prepare room service carts
- i) Set up dressing table, making sure you have pineapples & almonds
- j) Prep condiments: cocktail sauce, tartar, sour cream, crumbled blue cheese, parmesan, horseradish
- k) Check high chairs to ensure cleanliness
- l) Make ½ thermos coffee and decaf (if necessary)
- m) Ensure that there is enough stock of cream containers, ramekins, side plates, saucers and dinner plates with doilies, teaspoons in the kitchen service area. There should be enough to get you through the expected level of business for that night.
- n) Fill all candles with fuel and put one candle on each table in the main dining room.
- o) Attend roll call at 4:45 p.m. in the lounge
- p) At 5:00 p.m. ensure dinner menus are on Host stand.

### SunStream Hotels and Resorts Server (Page 11 of 12)

#### **4) P.M. Closing side duties**

- a) All tables to be fully cleaned and properly set for breakfast.
- b) Remove B&B's from all tables
- c) The espresso machine needs to be thoroughly cleaned and restocked with cups and spoons.
- d) Re-stock the bar area with glasses (Pints, beer glasses, red & white wineglasses, champagne flute etc) with straws and service trays.
- e) Empty and clean coffee machine and bleach tea containers and clean area. Take a pot of coffee to the bar.
- f) Put away lemons
- g) Cover condiments and make sure no juice is left in cans
- h) Wipe down all highchairs
- i) Sort silverware, glassware and racks from dishwashing area.
- j) The toaster station needs to be set-up and organized for the morning shift.
- k) All sugar bowls and salt / pepper shakers re-filled and on all tables.
- l) Put away salad station. Make sure dressings are put into a clean container and clean area
- m) Clean and organize computer area
- n) Clean and fill room service rack

#### **Authority Required:**

1. Able to ask for tools needed
2. Able to request more training when needed

#### **Performance Outcomes:**

1. Ensure we have the tools needed to carry out our daily service
2. Tasks completed successfully on a daily basis

### **7<sup>th</sup> Main Area of Responsibility:**

#### **G) General F&B Housekeeping Tasks**

##### **Tasks Required in Sequence:**

1. Clean tea storage Drawers
2. Clean lower levels of the Service Stand
3. Clean coffee Storage Area and Cupboard doors/Vinegar Bottles
4. Clean candles
5. Clean teapots / Cream Pitchers / Coffee pots & storage area for these
6. Clean menus & wine lists
7. Clean Ice Buckets & Stands
8. Clean Espresso Machine

### SunStream Hotels and Resorts Server (Page 12 of 12)

9. Clean Take Out (Station Set up, Monitoring)
10. Clean Sinks / Paper Towel & Soap dispensers
11. Clean Pepper mills & Shakers
12. Clean top shelves of Service Stand / All plants boxes & ledges / Tray stands
13. Clean Dessert fridge / Coulis bottles
14. Clean Storage Cupboard for Jams & Doilies / jam baskets
15. Clean Bread Basket Storage area / service trays / sugar storage area
16. Clean Salt & Pepper Shakers
17. Clean Chloe's Host Desk, Storage closet & display areas.

#### **Authority Required:**

#### **Performance Outcomes:**

1. Ensure we have the tools needed to carry out our daily service
2. Ensure entire restaurant area is clean and tidy

#### **Core Competencies/Skills:**

General serving knowledge, ability to do more than one task at a time, good memory, able to use the Squirrel system, friendly and professional, and able to converse freely with a variety of people.

#### **Career Stoppers:**

Not being friendly or nice to the guests, slow customer service delivery, lack of job knowledge to deliver a superior level of service to guests and poor organizational skills.

#### **Education/Experience Level:**

1 or 2 years of previous serving experience

#### **Position Requirements:**

1. Must have prior serving experience of two years or more.
2. Must have prior cash handling skills.
3. Must have prior experience with touch screen POS (point of sale) system
4. Must be able to stand, sit or walk for extended periods of time.
5. Must be able to lift up to 30 pounds on a serving tray.