

# MAKING JUDGEMENTS: PRACTICAL STRATEGIES FROM RESEARCH OUTCOMES

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*This paper has been prepared in support of an investigative workshop which will enable participants to explore the nexus between the Key Competencies and the formation of sound judgements. It relies heavily on a paper on a paper prepared by Paul Hager in 1998 for the NSW Department of Training and Educational Co-ordination. It is intended to provide the theoretical underpinnings and rationale for the material covered within the workshop. It is organised in the form of a short introduction followed by a definition of what is meant by making workplace judgements. Some of the key findings from research and pilot projects on the integration of the Key Competencies within vocational and general education are then outlined followed by a discussion of the role of the Key Competencies in the formation of judgements. The paper ends with a number of exercises which will be explored in the workshop and a brief concluding statement.*

Following the release of the report of the Mayer Committee in November 1992, there has been considerable exploration, through research and the conduct of trial projects, of the implications of systematically integrating the Mayer Key Competencies into school and vocational education and training (VET) programs. The outcomes of this research effort provide a rich source of practical strategies for VET practitioners. These strategies cover a wide range of educational activities including the design and development of curriculum, teaching and learning, assessment and reporting.

The Key Competencies were described by the Mayer Committee as representing the set of competencies which enable people to transfer and apply knowledge and skills developed in classrooms and other learning situations to the workplace. As such, they represent a crystallisation of "an agenda for an emphasis on higher order competencies in the process of general education and the development of more *adaptable, productive and autonomous* workers, persons and citizens" (MCEETYA Schools' Taskforce 1996, p. 9).

Subsequent research, for example Billet (1998), has questioned the concept of transfer of competence as generally described within educational psychology literature and proposed that transfer has social and contextual dimensions which need to be taken into account. This suggests that the role of the Key Competencies and the significance of context to them must also have a strong contextual basis.

Hager (1998) argues that the Key Competencies are fundamental to the process of humans making judgements and that the development of the Key Competencies is linked to the capacity to form sound judgements. He notes that research has identified four major characteristics of the Key Competencies which also apply to the construction of judgements. That is, they:

- cluster in actual learning and work situations
- are highly sensitive to contextual factors
- can be thought of as a process as well as an outcome
- are developmental.

A recognition of the nexus between the formation of judgements and the Key Competencies enables us to better conceptualise the role of the Key Competencies with respect to the development of workplace competence. Workplace competence might be defined as the accumulated knowledge, skill, experience and attitudes which can be applied to tasks within a workplace. Such competence is not a static quality but is in a constant developmental flux. The formation of workplace judgements relies on and is underpinned by this workplace competence and at the same time develops and transforms it. Thus, the process of making judgements is, like the application of the Key Competencies, "simultaneously underpinning, enabling, integrating, transforming and developmental" (Down 1997, p 8) .

This also implies that the development of the capacity to make sound workplace judgements will be enhanced by the systematic use of reflection within learning processes. By forming habits of reflecting, not only on what we have learnt but also the processes involved within such learning, we

are able to strengthen such learning. The Key Competencies are both necessary for this process and enhanced by it.

This workshop provides participants with the opportunity to explore the process of making workplace judgements and the role of the Key Competencies within this process. The activities undertaken will also assist participants to recognise the double loop learning gained through systematic reflection on the process. By making explicit the elements within cognitive processes, we are able to enrich the outcomes and enhance our competence, especially with respect to the making of judgements.

## **Making workplace judgements**

Judgement involves deciding what to believe or do by taking into account a range of relevant factors and acting accordingly (Hager 1998, p. 7). The making of judgements involves identifying and valuing relationships between factors and the context within which the judgement is made. The Key Competencies provide the cognitive tools for establishing and applying such relationships.

Sound judgements take into account the particular circumstances in which they are made. That is, they are contextually sensitive. This contextual basis is reflected in the emphasis placed within workplaces on experience, commonsense and nous. Sound judgements require the ability to differentiate the nuances of meaning which exist within particular workplaces, to express ideas and information in communicative forms compatible with such workplaces, to collect, analyse and organise workplace data and information and to recognise the social, cultural and political organisations and structures which impact on work situations.

Lipman (1991) sees judgement as central to effective thinking. He argues that, if inquiry is the process through which thinking is learnt, then the product of effective inquiry is judgement. He defines "thinking as a process of finding or making connections and disjunctions" (p. 159). Such connections and disjunctions are the relationships which are the objects of judgement.

In considering the development of the capacity for making sound judgements, three orders of judgements need to be considered. These are:

### **Generic judgements**

Such judgements are the most abstract and include judgements of similarity, difference and identity

### **Mediating judgements**

These are less abstract and include judgements of causation, value, fact and relevance

### **Culminating judgements**

These are the least abstract and apply directly to life situations. These include ethical, social, scientific, technological, professional and aesthetic judgements.

Lipman's view is that the first two orders of judgement underpin culminating judgements, something that he claims has not been widely recognised. Hence the reflective model of educational practice should cultivate the making of all three orders of judgements, since neglect of generic and mediating judgements commonly results in poor or mistaken culminating judgements

Lipman further argues that making judgements is not simply a function - something we do - but a developmental and transformational process. That is, making judgements, like applying the Key Competencies, is both a process and the outcome of that process.

...judgments, unlike skills, are minuscule versions of the persons who perform them. This is so in the sense that each and every judgment expresses the person who makes the judgment and at the same time appraises the situation or world about which the judgment is made. We are our judgments and they are us. This is why the strengthening of my judgment results in the growth and strengthening of myself as a person. (Lipman 1991, p. 171)

## Characteristics of the Key Competencies

The main trends and findings from the key competency pilot projects that have been conducted so far in Australia are summarised in a number of recent documents (Ryan 1997; MCEETYA Schools Taskforce Working Group on Key Competencies 1996; Hager, Moy & Gonczi 1997).

The major findings are that the Key Competencies:

- are overlapping and inter-related, rather than discrete processes with their own clearly identifiable performance levels
- must be contextualised in authentic or simulated environments
- should be viewed both as processes (involving enabling or underpinning knowledge) necessary for higher order learning and workplace performance *and* as outcomes
- are developed throughout life and with lifelong relevance
- can be learnt and should be taught
- are implicit in much of existing curricula
- should be integrated explicitly and systematically with technical competencies and into all aspects of training
- are an effective device to improve and motivate student learning
- provide a suitable framework for assessing achievement when statements of course learning outcomes integrate appropriate key competencies
- give a desirable explicitness and focus to the idea of the lifelong practical relevance of general education
- involve competencies that employers say they want and workers in high performance workplaces actually display

The first four of these findings provide the basis of this paper and its associated workshop as they not only provide the nexus between the Key Competencies and making judgements but they also provide the framework for practical approaches towards teaching and learning for and in vocational settings.

### 1. CLUSTERING OF THE KEY COMPETENCIES

Following the release of the Mayer Committee's report, it was commonly assumed that the Key Competencies were discrete independent skills each to be taught and assessed singly. For many this type of thinking has apparently been encouraged by acquaintance with the psychological literature on transfer with its emphasis on minimising and controlling variables. However, the research findings such as those of Gonczi et al. (1995), Lilly et al. (1996) and Down et al. (1997) suggest that when any significant unit of work is considered, the Key Competencies occur in complex clusters along with other more specific competencies. Analyses of significant work activities indicate that they typically feature both specific work skills and key competencies (usually more than one) as well as aspects of the particular work context. Thus, work contexts integrate specific skills and Key Competencies. The Key Competencies provide a framework for holistically describing and conceptualising work as a basis for training. If particular units of work can be described without involving the Key Competencies, then the work units are probably being described too narrowly to be useful from a training perspective.

All the major DEETYA-funded research projects on the implementation of the Key Competencies within the VET sector argued against a prevailing myth which viewed the Key Competencies as discrete entities which could be described and taught in isolation and then transferred to new situations. This runs counter to commonly used conventions for describing work in terms of discrete, specific skills. Recent research projects (Gonczi et al 1995, Hager et al 1996, Stasz et al. 1996), demonstrated that specific skills are deployed in a context which typically changes somewhat from work site to work site, from client to client, from order to order, from case to case. The requirement that skilled work take into account changing context will, per se, involve the clustering of specific skills and the Key Competencies within a contextual framework.

Because work is seldom as narrow as task-based competency standards might suggest, the Key Competencies are far from being 'optional extras' in workplace learning and training. If these activities are being carried out well, then they will automatically incorporate and contextualise at least some of the Key Competencies. The same clustering of the Key Competencies both with one another and with more specific skills was identified in research carried out on the inclusion of the Key Competencies within school-based education. Thus, the pilot projects strongly recommended the adoption of holistic, integrative teaching and training orientations.

## 2. CONTEXTUAL SENSITIVITY OF THE KEY COMPETENCIES

Recognition of the contextual nature and sensitivity of workplace competence has been institutionalised in the acceptance of enterprise specific competency standards (eg. McDonalds Family Restaurants, Chubb Security) and the contextualisation of industry standards within specific enterprises or sectors of an industry (eg. Parks Victoria, Ford Motor Company). Given the clustering of the Key Competencies with other more specific competencies discussed above, it follows that the context in which they are developed and applied will strongly affect the nature and applications of the Key Competencies. That is, the role of Key Competencies is strongly sensitive to changes in work context. The different forms that the Key Competencies take in different workplace contexts has now been confirmed by both Australian (Gonczi et al. 1995, Hager et al. 1996, Stevenson 1996, Down et al. 1997) and overseas (Stasz et al. 1996) research. Stasz et al. concluded that:

...whereas generic skills and dispositions are identifiable in all jobs, their specific characteristics and importance vary among jobs. The characteristics of problem solving, teamwork, communication, and disposition are related to job demands, which in turn depend on the purpose of the work, the tasks that constitute the job, the organisation of the work, and other aspects of the work context. (p. 102)

The Australian research also found that different combinations of the Key Competencies are required in different industries and occupations. It has been found also that the key competencies are major features of work in workplaces that focus on high performance or high quality products (Field & Mawer 1996, Gonczi et al. 1995).

Noting the contextual sensitivity of the key competencies in classroom and workplace situations, the pilot projects on the implementation of the Key Competencies within the school and VET sectors concluded that teaching and learning methods that appear to work well include critical incident scenarios, problem-based learning, and trainer and trainee assessment tools which integrate the key competencies. Mapping activities and the development of contextualised descriptors were also useful in relating the Key Competencies to workplace training activities and in identifying areas in which the Key Competencies could be used to improve current practices.

## 3. KEY COMPETENCIES AS BOTH PROCESSES AND OUTCOMES

Field testing has demonstrated that it is helpful to view the Key Competencies as both processes and outcomes. It was found that

... they all share a common process, where the common features of the key competencies are: establishing a sense of purpose; selecting appropriate strategies; implementing strategies; and evaluation of both the process and the product. (Ryan 1997, p. 15)

Such a finding fits well with the holistic (or integrated) approach to competence which has been widely adopted in Australia. According to this approach, competence is conceptualised in terms of knowledge, abilities, skills and attitudes displayed in the context of a carefully chosen set of realistic occupational tasks which are of an appropriate level of generality. This approach to competence seeks to link general attributes to the context in which these attributes will be employed.

A feature of this integrated approach is that it avoids the problem of fragmentation by selecting key tasks or elements that are central to the practice of the occupation. The main attributes that are required for the competent performance of these key tasks or elements are then identified. When both of these are integrated to produce competency standards, the results capture the holistic richness of the practice of an occupation, including such things as professional judgement. This approach also allows for there being more than one appropriate response in a given situation, as well as for the framing of unique responses to changing contexts.

To focus on the deployment of the attributes (knowledge, attitudes, and skills) to the completion of tasks in contextually sensitive ways, is to focus on the process aspects of competence and what underpins it. Typically, clusters of the Key Competencies feature in these attributes. Alternatively, a focus on the broad range of general and specific tasks that comprise an occupation points to the kinds of outcomes expected of courses that prepare candidates for the occupation. An analysis of these outcomes will show that their achievement logically presupposes a variety of attributes, many of them Key Competencies. Thus Key Competencies, and attributes generally, can be viewed as both processes and outcomes.

#### 4. THE DEVELOPMENTAL CHARACTER OF THE KEY COMPETENCIES

It is important that the acquisition of proficiency in the Key Competencies needs to be seen as a developmental process stretching over a substantial part of the life span. The application of the Key Competencies within work and learning reshapes and transforms our experience and competence in using them. When trainees/apprentices start their employment with a firm, their participation is peripheral and they are seen as only partly legitimate members of that enterprise. The more that trainees/apprentices become full participants in the social and technical world of the enterprise, they apply the key Competencies in more and different ways with an increasing level of complexity within their work performance.

Similarly from the early years of schooling, and even before, learners can be expected to be in situations in which they would be acquiring some basic proficiency in deploying at least some of the Key Competencies, eg. using household microelectronic technology. One outcome of a sound education would be a growing capacity to deploy successfully these competencies in an increasingly diverse range of situations and contexts.

Since sound performance in very many of life's situations centres on successful deployment of suitable combinations of key competencies, the development of the key competencies should become gradually more integrated and holistic as young people move through schooling. Such a staged development of the key competencies would facilitate students' transition to work and other post-school activities.

However, it is crucial that the Key Competencies should be thought of more broadly than in terms of just school and work. These competencies represent a basis for lifelong learning in all kinds of life situations. Rather than being viewed as discrete skills that people learn to transfer, the Key Competencies should be seen as learnt capacities to handle an increasing variety of diverse situations. Thus transfer can be seen as a growth in confidence and adaptability as learners experience increasing success in their deployment of the key competencies to a range of situations. The role of the Key Competencies within such transfer is enabling, transforming and developmental and is related to a growing understanding of how to deal with different contexts. In this way, non-work experiences can benefit workplace performance and vice versa.

#### Role of the Key Competencies in making judgements

Hager (1998, pp. 8,9) argues (substantially influenced by the 'Essential Elements Statement' contained in the NSW Key Competencies Project report (Ryan 1997, p. 122 - 124)) that in typically making and/or implementing a judgement, people will engage in some or all of the following processes:

##### **acquiring an information base for the judgement**

Where necessary, appropriate information will be gathered, evaluated and ordered. This applies both in everyday life (eg. someone thinking of adding an extension to their family home needs to consider dimensions, materials, architectural styles, cost options etc. ) and at work (where information is gathered from clients, patients, customers, policy makers, managers, handbooks, trade manuals, catalogues, co-workers, suppliers, etc.).

##### **communicating what needs to be done, what has been decided or what needs to be ascertained clearly and coherently to others**

This will be done in ways that are judged to cater for the type of audience. Where necessary, the communication will be revised and modified to ensure its purpose is achieved. For example, in the workplace, communication with clients, patients, or customers, will be recognisably different from communication with co-workers or fellow practitioners.

##### **planning and organising activities judged suitable to the case**

Priorities will be set to attain goals in a timely and efficient way. The procedures will be modified as they are implemented if changing circumstances require it. This is as true of the planning and organising involved in developing, implementing and monitoring a business plan, as it is of a health profession treating a patient's medical condition or of a motor mechanic repairing a customer's car.

### **working with others and in teams to form and /or to implement the judgement**

Cooperating with others or working in a team are often prerequisites for arriving at a sound judgement; equally they are often important in its implementation, as the examples outlined above show. It is vital that people are clear on what their contribution to the judgement formation or implementation is, and take responsibility for performing accordingly.

### **using mathematical ideas and techniques in forming and /or in implementing the judgement**

In many instances of judgements being formed and exercised, the judgements are informed by and rely to some extent on appropriate application of mathematical ideas and techniques. For example, monitoring quality processes within a manufacturing environment or in developing budget plans.

### **using technology in forming and /or in implementing the judgement**

Similarly, many instances of judgements being formed and exercised rely on some application of technology. For instance, in designing and implementing preventive and predictive maintenance system the judgements made are informed by and rely to some extent on appropriate application of technology.

### **solving problems involved in forming and /or in implementing the judgement**

Part of arriving at sound judgements and successfully implementing those judgements is to anticipate and clarify problems that arise and to identify and apply strategies that suitably address the problems.

These considerations indicate how judgements tend to be nested within judgements, ie, the implementation of larger judgements such as adding an extension to a house or repairing a car, involve further judgements along the way, such as whether the building works are on schedule or whether a particular piece of equipment is performing satisfactorily.

## **Workshop exercises**

The following exercises are drawn or adapted from the major DEETYA-funded Key Competencies research reports conducted in New South Wales, Victoria and South Australia. They use participatory learning strategies such as the use of critical incidents, investigative or inquiry-based learning, problem-based learning, project learning and reflection. As such, they are designed to:

- contextualise learning
- draw on the experience of other learners to enhance their own and others' understanding
- review, praise and reinforce positive achievements
- discuss and learn from negative situations
- explain how performance is linked to goals within a workplace
- help learners think about how their values and actions can affect others
- help learners think about other possible viewpoints (such as those of customers, suppliers, colleagues and supervisors)
- prepare learners to deal with similar incidents, problems and situations
- think about alternative approaches which could be used in the future

All the exercises involve the formation of judgements from a given scenario. As part of the workshop, participants will role play aspects of the scenario, make decisions as to actions which could be taken, reflect on their deliberations and identify the cluster of Key Competencies involved in their recommended actions. In addition, participants will be encouraged to reflect on the Key Competencies used to participate effectively in the workshop exercises.

The workshop will conclude with a plenary session where participants will report back on their deliberations and the insights gained.

## **Conclusion**

The nexus between making judgements provides us with an organising framework for ensuring that the development of the Key Competencies is built into teaching and learning. Although the Key

Competencies developed within the context of transitions from schooling to work, their application is much broader than this and provide a basis for lifelong learning in all sorts of situations.

In addition, focusing attention on the holistic, integrated, contextual character of the Key Competencies via their central role in human judgement has the effect of advantageously addressing a number of current educational issues. These include the need to:

- enrich competency approaches in general
- give more substance to the notion of lifelong learning
- develop effective ways to think about work-based learning.

Such attention needs to be supported within vocational education and training by the use of participative learning strategies and systematic reflection to enable learners to develop and enhance their capacity to make sound judgements in their work, learning and daily life.

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## Workshop Exercise 1

### WE1 Scenario

We have all witnessed or been involved in workplace accidents on at least a minor scale. In this scenario, a particular accident is selected and discussed so as to form judgements as to its cause and the appropriateness of the action taken to handle the situation and to prevent its re-occurrence.

Group participants take the roles of a safety committee looking into a workplace accident that has occurred. One member of the group reports on the incident and the others (in the role of union rep, OH&S Manager, Supervisor, Area Manager etc.) ask questions as to the accident, its cause(s), effects and the prevention measures which have been adopted to prevent its re-occurrence are discussed.

### Hint

Use a real incident. The person reporting should have been a spectator to (or well informed about) the accident and know what actions were taken after the incident.

**Activity**

1. Describe the witnessed accident and the actions which were taken as a consequence of it.
2. Identify why the incident occurred.
3. Review how key people handled the situation:
  - note instances of sensitive and constructive behaviour to ensure that morale and teamwork aren't damaged
  - consider different ways of handling the situation.
  
1. Identify the judgements which were made during and after the incident and which of the following Key Competencies were applied:
  - collecting, analysing and organising information
  - communicating ideas and information
  - planning and organising activities
  - working with others and in teams
  - using mathematical ideas and techniques
  - solving problems
  - using technology.
  
1. Discuss:
  - what positive elements could be applied to other situations?
  - what could be done differently next time, why and the likely outcomes?
  - what judgements have you as a group made during this exercise and which of the Key Competencies were used in this process?

## Workshop Exercise 2

### WE2 Scenario

A common retail strategy is to have a display of wares just outside the doorway to a shop. Often these goods are being offered at special prices or it may be a new line. Such displays can also be used to clear stock which has been slow to sell or to entice people into the store.

The staff of the "Clothes-R-US" fashion boutique (the sole fashion store in a small country town) consists of the manager, a permanent senior assistant, a trainee and a number of part-time assistants. At a staff meeting the effectiveness of the current rotation of the stock positioned at the store entrance during weekend trading is to be discussed. The senior assistant notes that there has been some complaints from older customers that young people hang around the display and obstruct the doorway. The trainee seeks clarification of what the purpose of the display is.

**Activity**

1. Describe the purpose(s) of the display.
2. Identify problems which have occurred and how these might be resolved or minimised. Note any conflicts of interest.
3. Review how key people have handled the situation:
  - note strategies used to relate negative incidents sensitively and constructively so that morale and teamwork aren't damaged
  - consider different ways of handling the situation
  
1. Identify the judgements which were made during the discussion and identify which of the following Key Competencies were used in the formation of these judgements:
  - collecting, analysing and organising information
  - communicating ideas and information
  - planning and organising activities
  - working with others and in teams
  - using mathematical ideas and techniques
  - solving problems
  - using technology.
  
1. Discuss:
  - what positive elements could be applied to other situations?
  - what could be done differently next time, why and the likely outcomes?

## Workshop Exercise 3

### WE3 Scenario

A trainee hairdresser meets with her first "customer from hell". She is encouraged by the salon owner to watch how the more experienced staff deal with the customer's demands and complaints. During a lull in work activities shortly afterwards, the staff gather round and the trainee is encouraged to work through the following steps assisted by more experienced members of the salon staff.

#### Activity

Role play this impromptu meeting by contributing other incidents of "customers from hell" and the successful strategies which have been employed

1. Describe the behaviour of the customer.
2. Identify why the incident occurred.
3. Review how key people handled this and similar situations:
  - note strategies used to deal with the customer sensitively and constructively so that customer satisfaction and staff morale and teamwork aren't damaged
  - consider different ways of handling the situation
1. Identify the judgements which were made by experienced staff to deal with such situations and identify which of the following Key Competencies were important:
  - collecting, analysing and organising information
  - communicating ideas and information
  - planning and organising activities
  - working with others and in teams
  - using mathematical ideas and techniques
  - solving problems
  - using technology.
1. Discuss:
  - what positive elements could be applied to other situations?
  - what could be done differently next time, why and the likely outcomes?

## Workshop Exercise 4

### WE4 Scenario

This scenario is concerned with the need for retail staff to be able to process a sale quickly, efficiently and accurately. For many retail outlets, the majority of transactions tend to be concentrated during the lunch period. This means that trainees often encounter difficult or unfamiliar transactions during these busy periods. The following scenario and questions help learners to explore the issues concerned and to develop improved strategies for dealing with customers

You have a queue of five customers and the first customer wishes to cancel a lay-by. It has been a week since you have had to process a similar transaction and you have difficulty remembering the steps involved.

The other four customers are restless and are showing signs of impatience. One customer has expressed her hope that the wait is not too long as she has only a short lunch period in which to shop.

#### Activity

As a group, discuss what you think the trainee should do to process the cancellation quickly and keep all five customers contented? Look at the following approach and work through the following questions.

#### Suggested Approach

- acknowledge all of the customers

- explain that you will be with them as soon as possible
  - systematically follow the instructions in the administration manual for cancelling a lay-by
  - do not rush. Stay calm and efficient
  - thank the other customers for waiting
  - process the remaining sales.
- What are the advantages and disadvantages of this approach? How might it be improved?
  - Are there any other approaches which might be appropriate?
  - How are the Key Competencies involved in addressing this problem scenario?

## Workshop Exercise 5

### WE5 Scenario

A particular hotel is experiencing a "slack" period in the first weekend of May. The manager has taken advantage of the lull and has gone to see his ailing mother who lives three hours drive distant. The trainee manager, temporarily-in-charge receives notification that there has been a minor collision between two taxiing planes and that he is to consequently expect, in three hours time, a group of 50 stranded airline passengers for an unscheduled lay over. The people are a mix of nationalities and age groups.

Whilst he can guess that the travellers will want to check into their rooms immediately, will be tired and annoyed that their planned itinerary has been upset, will need to make special arrangements and will need to notify others of their changes of plans, he has not previously had first-hand experience of such a situation. In addition to the manager's absence, there are two staff who have been given special leave. He decides to call together the remaining staff to brainstorm what will need to be done and to allocate responsibilities

#### Activity

Role play this impromptu meeting with each participant taking on the role of a different staff member (conciierge, housekeeper, front-desk, chef, administration etc.)

1. Describe the tasks that need to be attended to and assign responsibilities.
  2. Identify likely problems.
  3. Review how people have handled the situation in the past:
    - note the strategies used to deal with negative incidents sensitively and constructively so that morale and teamwork aren't damaged
    - consider different ways of handling the situation
1. Identify which of the following Key Competencies were important:
    - collecting, analysing and organising information
    - communicating ideas and information
    - planning and organising activities
    - working with others and in teams
    - using mathematical ideas and techniques
    - solving problems
    - using technology.
1. Discuss:
    - what positive elements could be applied from other situations?
    - how the group can learn from the experience and systematise this learning?