National Occupational Standards

Adventure Guide

emerit®

by Tourism HR Canada

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Contents

Introduction

Tourism HR Canada is a pan-Canadian organization with a mandate aimed at building a world-leading tourism workforce. It facilitates, coordinates, and enables human resource development activities that support a globally competitive and sustainable industry and foster the development of a dynamic and resilient workforce.

Tourism HR Canada is your source for current human resources issues and solutions. The organization works with the industry to attract, train, and retain valuable tourism professionals by giving them the tools and resources they need to succeed in their careers and entrepreneurial endeavours.

To promote sustainable human resource development and a training culture in the tourism sector, Tourism HR Canada develops and offers a variety of supporting emerit® products, including National Occupational Standards, training resources, and professional certification programs.

emerit®
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Standards Overview

Comprehensive and Inclusive

These National Occupational Standards provide a comprehensive summary of the competencies adventure guides must have to be successful in the many different job situations they face on a daily basis.

Competencies are a set of skills and related knowledge that allow an individual to successfully perform a task or an activity within a specific function of a job. The competencies contained in these National Occupational Standards are drawn from Tourism HR Canada's Competency Framework for Tourism, which is housed in the emerit® Workforce Management Engine.

The Workforce Management Engine includes a comprehensive library of 425+ competencies. These competencies are the building blocks that describe the performance and knowledge required for a dynamic, resilient, diverse and inclusive tourism workforce. The Workforce Management Engine provides access to the competencies through a range of outputs (such as this National Occupational Standards document) and tools.

How the Standards Are Structured

Competency Categories

Competencies are grouped into categories that are organized according to workplace themes associated with business practices and job expectations.

Competency Areas

Each competency category is broken down into competency areas. Each competency area includes a cluster of competencies that define what a person is expected to be able to do and know.

Competency

A competency is defined as a set of skills and related knowledge that allow an individual to successfully perform a task or an activity within a specific function of a job.

Each competency includes several components:

Purpose: why or how that competency is relevant to the occupation

Performance and Abilities: behaviours required for successful job performance

Knowledge: underpinning knowledge required to meet performance requirements

Competencies and standards also contain additional contextual variables that support their application for various purposes, such as creating curriculum, developing training programs, or illustrating career paths. Additional information can include level of practice, associated occupations, Bloom's taxonomy, and contextual rating scales (e.g., criticality, frequency, level of difficulty, autonomy, and time required to gain proficiency).

For more information on contextual variables, please contact info@emerit.ca.

How Are Standards Used?

The emerit® National Occupational Standards for Adventure Guide form a comprehensive set of knowledge and skills needed to perform successfully on the job. Adventure guides, students, educators, managers, employers and business owners are just some of the people who can benefit from these standards.

Tourism HR Canada recognizes that businesses may have internal policies that affect how skills are performed. The National Occupational Standards provide a general base of information upon which an establishment can build its policies.

Are you a Adventure Guide?

Use the Standards as a guide to:

- have a clear understanding of specific job requirements
- identify the competencies you already have and those you need to improve
- develop a learning plan to develop those competencies you do not currently have

Your particular job context and level of responsibility will determine whether all or only selected competencies apply to you.

Are you a Trainer or Educator?

Use the Standards to:

- ground learning outcomes in industry-validated competencies
- design learning projects and assessment tools
- evaluate curriculum against occupations and industry-validated competencies
- assess learning and performance to ensure your graduates are industry ready

Are you an Employer, Business Owner or Human Resources Professional?

Use the Standards to:

- find the right employees
- manage performance
- train and develop employees
- support career exploration and planning

Are you a Student, Job Seeker or Career Development Professional?

Use the Standards to:

- identify career interests
- explore tourism careers
- perform a job-fit analysis
- facilitate career exploration
- develop career paths
- support job search activities

Job Definition

Adventure Guide

Adventure guides lead groups to outdoor locations to participate in adventure activities such as whitewater rafting, hiking, canoe expeditions, mountain climbing or dog sledding. Their responsibilities include planning and leading single or multi-day trips and providing guests with an interesting experience in a manner that minimizes risk and environmental impact.

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Competency Chart

Competency Chart

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1.1.1 Contribute to culture of service excellence

Purpose

The success of an organization is directly related to how well its culture of service excellence consistently meets the needs and expectations of clients. Practitioners who seek ways to improve service and consistently meet expectations can create memorable client experiences and encourage return business. When clients experience poor service, individual organizations, service industries and destinations suffer from bad reputations and poor sales.

Performance and Abilities

1. **complete work tasks to high standard, ensuring that:**
    - timelines are met
    - work is accurate and complete
    - prioritization of tasks is based on importance
2. **meet clients' needs:**
    - be proactive, e.g. anticipate clients' needs
    - embrace diversity and inclusion, e.g. culture, gender, ability
    - be dependable and accurate when responding to needs
    - empathize with clients and their concerns:
        - solve problems within limits of authority quickly and efficiently
    - be enthusiastic and attentive:
        - have can-do attitude
3. **communicate effectively**
4. **demonstrate interpersonal awareness, for example:**
    - recognize inherent biases of self and others
    - acknowledge interests and concerns of others
    - appreciate others' strengths and weaknesses
    - anticipate others' reactions to situations
    - practice self-awareness and self-reflection
    - behave ethically
5. **promote organization:**
    - share knowledge of organization and its programs, products and services
    - promote vision, mission, values and ethics of organization

Knowledge

1. organization's service excellence and continuous improvement programs
2. relevance of diversity and inclusion to culture of service excellence
3. relevant policies and procedures, e.g. complaint resolution, limit of authority
4. task management techniques

1.1.2 Greet clients

Purpose

Properly greeting clients sets a positive tone and creates a desirable impression that reflects well on practitioners and the organization. It lets clients know that the organization values their business, will give them personal attention and strive to meet their needs.

Performance and Abilities

1. **acknowledge clients:**
   - ensure appropriate timing, e.g. acknowledge clients within 30 seconds of entry
   - recognize clients' presence using method appropriate to distance, for example:
     - use verbal acknowledgement for clients who are in close proximity, e.g. 1.5 metres (5 feet)
     - use nonverbal acknowledgement for clients who are a distance away, e.g. 4.5 metres (15 feet)
   - use appropriate tone, volume and nonverbal cues
2. **engage clients:**
   - make eye contact
   - use positive body language, e.g. observe personal space, use open body language
   - provide a warm and welcoming greeting
   - smile
   - introduce self, if appropriate
   - use client's name when possible, e.g. "It's nice to see you, Ms. Smith."
   - show interest in client, e.g. "How was your son's graduation?"
3. **exhibit professional appearance, e.g. proper posture, neat attire**
4. **communicate effectively, e.g. listen actively, use appropriate verbal and nonverbal communication**
5. **assess clients' needs:**
   - review pre-arrival or pre-shift information, when available and applicable
   - anticipate clients' needs, e.g. take cues from visual appearance, size and type of group, purpose of visit to establishment
   - ask clients to share information about needs, e.g. front desk clerk would confirm reservation details, host would confirm reason for dining
   - offer assistance to make client more comfortable, e.g. take coat, hold door
   - ask open-ended questions to determine how best to help clients or add value to visit
   - watch for indications of stress or need of additional support, for example:
     - pay attention to client's demeanor, e.g. does client look ill or stressed?
     - pay attention to words used and to tone and volume of voice, e.g. does client seem annoyed or worried?
     - observe young children, elderly people or clients with disabilities to determine needs

Knowledge

1. norms of different cultures and acceptable practices related to greeting individuals or groups
2. organization’s product, services and systems
3. relevant policies and procedures
4. verbal and nonverbal communication techniques

1.1.3 Meet clients' needs

Purpose

Clients feel valued when their needs are properly met. When practitioners are willing and able to accommodate diverse needs, organizations fulfill legal requirements to serve all clients fairly. Meeting clients' needs also enhances their satisfaction, enjoyment and loyalty.

Performance and Abilities

1. **review pre-arrival/pre-shift information, when available and applicable**
2. **demonstrate respect for all clients' needs and preferences, for example:**
   - behave ethically and professionally
   - verify assumptions about individual clients rather than acting based on generalizations
   - confirm needs, e.g. type of room required, how bills are to be split, mobility needs
   - respond positively to unfamiliar requests
3. **use knowledge of client needs and preferences to proactively meet and surpass needs, for example:**
   - highlight specialty dietary options, e.g. gluten-free, vegan, lactose free, halal, kosher
   - provide bowl of water for client with service dog
   - offer curb-side pickup for client who has difficulty entering facility
   - offer free dessert to acknowledge special occasion
4. **prioritize clients' needs by taking applicable factors into consideration, for example:**
   - time sensitivities
   - reservations
   - confidentiality requirements
   - specialty orders
   - group dynamics
   - privacy requirements of special delegates
5. **determine appropriate course of action**
6. **accommodate needs, for example:**
   - take ownership of request (within limits of authority) or connect client with appropriate employee
   - discuss options with clients and confirm their preference
   - maintain confidentiality and privacy
   - accommodate additional needs when possible, e.g. arrange transportation to airport
   - refer clients to services where needs can be met
   - keep clients informed of progress as necessary, for example:
     - provide updates on wait times for seating or table service
     - provide maintenance reports

7. **confirm clients' needs were satisfactorily met:**
    - gather client feedback
    - confirm if anything else can be done
8. **record client feedback:**
    - file record, e.g. on computer, in cabinet
9. **use client feedback to improve products and services, as required**

Knowledge

1. **inclusive behaviours in client service, e.g. verify assumptions**
2. **local resources and available assistance**
3. **organization's product, services and systems**
4. **relevant legislation and regulations, e.g. protected grounds**
5. **relevant policies and procedures**
6. **types of common barriers that clients may experience**

1.1.4 Promote organization and destination

Purpose

Promoting the organization and destination increases clients' knowledge of information that can enhance their visit. It also benefits the organization and destination by improving revenue, client loyalty, brand recognition, positive destination awareness, employment opportunities and business development opportunities.

Performance and Abilities

1. **promote organization:**
   - share information about available services
   - use promotional products, e.g. brochures, organization's website
   - follow organization's dress code, e.g. wear company clothing appropriately
   - share information with traditional and social media according to organization's policies
2. **promote destination:**
   - share promotional products, e.g. brochures about local attractions, map of area, events calendar
3. **make clients feel welcome:**
   - greet clients, e.g. smile, say "welcome"
   - accommodate additional needs when possible, e.g. arrange transportation to airport
   - invite clients back
   - thank clients for business
4. **update knowledge about organization and destination as required**

Knowledge

1. **attractions and services available in destination**
2. **information about destination of interest to clients, e.g. statistics, demographics, history, geography, current and significant historical events**
3. **organization's products and services**
4. **organization's history, mission, goals and culture**
5. **relevant policies and procedures**
6. **tourism sector**

1.1.5 Use client profiles

Purpose

Client profiles enable organizations to provide tailored service to clients based on their needs and preferences.

Performance and Abilities

1. **create profile for client on first contact with organization, e.g. generate file**
2. **enter relevant information, for example:**
   - contact details
   - preferred method of contact, e.g. phone, email
   - loyalty program membership and associated benefits
   - special requests, e.g. pet-friendly room, transportation, dietary needs
   - accessibility requirements/requests, e.g. accommodations, seating, vehicle
   - reason for travel, e.g. business or leisure
   - interests
   - culinary preferences, e.g. preferred cuisine, dietary restrictions
   - connections to other profiles, e.g. spouse, groups
   - medical concerns
3. **update client profile during or after additional interactions, e.g. ask questions while taking reservation**
4. **communicate relevant information to other departments (e.g. housekeeping, food and beverage) to enhance service**
5. **tailor services based on information in client profile, for example:**
   - provide recommendations based on client's interests, e.g. restaurant serving favourite food
   - provide preferred cocktail/beverage upon arrival
   - recognize opportunities to exceed expectations, e.g. send email with coupon on birthday

Knowledge

1. **attractions, products and services available in destination**
2. **organization's physical property, e.g. room layouts, floor plans, outside facilities**
3. **organization's products and services**
4. **organization's system for recording client profiles, e.g. customer relationship management system, reservation system**
5. **roles and responsibilities of departments and positions in organization**

1.2.1 Address concerns and complaints

Purpose

When organizations address concerns and complaints, clients feel validated. Resolving problems and taking steps to prevent them from recurring reduces client frustration and promotes a positive business reputation.

Performance and Abilities

1. **identify nature of concern or complaint, for example:**
   - listen actively
   - ask open-ended questions to obtain detailed information
   - observe client body language and nonverbal cues
2. **reflect client's information and emotion:**
   - paraphrase concern or complaint to demonstrate understanding
3. **acknowledge concern, for example:**
   - empathize with client
   - apologize for inconvenience
   - thank client for voicing concern
4. **investigate concern or complaint further, if necessary, e.g. contact relevant departments**
5. **evaluate severity of concern**
6. **select appropriate solution:**
   - ask for client's input, e.g. "What can I do to correct the situation?"
   - consider relevant factors and available resources
7. **summarize information for client:**
   - inform client of action to be taken and time frames for action, or
   - inform client in clear and unoffending way why concern or complaint cannot be resolved
8. **take immediate action to resolve concern or complaint:**
   - request management assistance, if unable to satisfy client within scope of authority or situation escalates
9. **follow up, for example:**
   - ensure concern or complaint has been addressed
   - identify if additional follow-up is required
   - recommend or take action to prevent similar occurrences
   - log client's concern or complaint and action taken
10. **identify repeated client concerns or complaints to prevent reoccurrences:**
    - inform appropriate individuals

Knowledge

1. clients' service needs and expectations
2. communication techniques, e.g. verbal and nonverbal language, using active listening, using open-ended and closed-ended questions
3. conflict resolution techniques
4. importance of client service
5. relevant policies and procedures
6. scope of own authority and limitations to what can be offered to clients

1.2.2 Address clients' undesirable behaviours

Purpose

When clients exhibit undesirable behaviour, it is important to address the issue quickly and effectively. This allows the organization to establish boundaries, prevent escalation and reduce the impact on others. If an undesirable behaviour escalates, the risk to clients, practitioners and the organization could be high.

Performance and Abilities

1. **maintain composure:**
    - stay calm and relaxed
    - do not take behaviour personally
2. **respond in professional manner:**
    - acknowledge issue
    - ask client exhibiting undesirable behaviour and/or observers open-ended questions
    - listen actively
    - restate nature of issue
    - speak clearly and with authority
    - ask client politely, but firmly, to refrain from undesirable behaviour
    - end on positive note or escalate to next level, e.g. call for assistance

Knowledge

1. **behaviour management techniques and strategies**
2. **conflict resolution techniques**
3. **emergency contact information**
4. **relevant legislation and regulations, e.g. workplace violence, harassment**
5. **relevant policies and procedures**

2.1.1 Behave ethically

Purpose

Practitioners behave ethically to comply with industry best practices and legal requirements. They conduct themselves in an ethical manner to establish and protect their own reputations as well as that of their organization. Unethical behaviour in the workplace contributes to a toxic environment.

Performance and Abilities

1. **demonstrate consistently high standards of behaviour, for example:**
   - be caring, considerate and respectful of others
   - be trustworthy and honest
   - respect competitors
2. **act with integrity, for example:**
   - interact in fair, honest and open manner
   - accept responsibility for own actions and decisions, e.g. admit mistakes
   - avoid conflicts of interest
   - be punctual
   - honour agreements
3. **maintain confidentiality, for example:**
   - be discreet, e.g. do not voice personal details
   - protect information from unauthorized individuals, e.g. ensure documents are not left unattended, store information in secure location
   - avoid use of email or social media to transmit confidential data, i.e. any type of personal identification information
   - shred unnecessary confidential papers
   - guard password information

Knowledge

1. **organization's code of conduct/ethics**
2. **relevant legislation and regulations, e.g. privacy, confidentiality, fraud prevention**
3. **relevant policies and procedures**

2.1.2 Present professional image

Purpose

Presenting a professional image encourages respect and trust. It also lends credibility and legitimacy to the practitioner and organization. Developing and maintaining one's professional image can lead to enhanced self-confidence and self-esteem. Failing to maintain a professional image can negatively impact clients' perceptions and the organization.

Performance and Abilities

1. **follow organization's policies, e.g. dress code, personal hygiene, scent free**
2. **demonstrate good grooming and hygiene:**
    - dress appropriately for work:
        - ensure clothes are clean and wrinkle-free
        - wear suitable attire for work being performed
    - maintain high standards of personal hygiene, e.g. clean hands, brush teeth
3. **behave professionally:**
    - exhibit confidence
    - have positive, friendly attitude
4. **communicate effectively**

Knowledge

1. **relevant legislation and regulations, e.g. workplace health and safety**
2. **relevant policies and procedures**

2.1.3 Maintain positive attitude

Purpose

A positive attitude develops satisfying and productive relationships with clients and co-workers. It also helps to develop self-confidence and self-esteem. Responding positively to difficult situations is a valuable self-management skill.

Performance and Abilities

1. **display positive attitude, for example:**
    - present professional image
    - show self-control
    - show respect for others
    - show initiative
2. **use positive language, for example:**
    - express appreciation to co-workers who provide support
    - provide constructive feedback instead of criticism
    - avoid complaining
3. **display patience, for example:**
    - allow people to provide full explanations
    - repeat information using different words if not clear to listeners
    - speak quietly and calmly in difficult situations
4. **maintain flexibility, i.e. adapt to changes and unexpected situations:**
    - display openness to other perspectives
    - shift to new strategy if selected strategy doesn't work

Knowledge

1. **organization's vision, mission and goals**
2. **techniques for fostering and maintaining positive attitude**
3. **techniques for providing constructive feedback**

2.2.1 Promote teamwork

Purpose

Promoting teamwork contributes to a positive environment and greater productivity. Contributing to a team's ability to work well together and achieve its common goals is important to an organization's success.

Performance and Abilities

1. **maintain clear and positive communication with team members, for example:**
   - model effective communication skills, e.g. listen actively
   - offer constructive feedback
2. **maintain positive relationships with team members, for example:**
   - maintain positive attitude
   - behave ethically
   - recognize how own actions affect others
   - treat team members with courtesy and respect
   - work together regardless of members' strengths, weaknesses and differences
   - show appreciation for work of team members
   - build consensus within team, e.g. negotiate, be adaptable
   - be receptive to others' input, e.g. accept constructive feedback
3. **contribute to team, for example:**
   - take ownership of one's roles and responsibilities
   - complete own tasks within timeframes
   - adhere to quality standards
   - discuss organizational goals with team members, e.g. who will do what and when
   - ask for and offer assistance when needed
   - share knowledge, skills and experiences constructively, e.g. suggest possible improvements at staff meetings or in logbook
   - resolve conflicts, e.g. collaborate to find effective solutions
   - carry out requests from team members promptly
   - participate in team meetings and activities
   - encourage active participation of other team members
   - create opportunities to collaborate, e.g. participate in formal team-building activities, organize informal recreational activities

Knowledge

1. own strengths and weaknesses, and those of co-workers
2. principles and dynamics of teamwork
3. relevant legislation and regulations, e.g. privacy
4. relevant policies and procedures
5. roles and responsibilities of team members
6. stages of group formation, e.g. forming, storming, norming, performing and transforming

2.2.2 Develop professional network

Purpose

Developing a professional network results in mutually beneficial business relationships. Professional networking and community involvement increase the potential for business and destination collaboration and personal and professional development. Developing a network and collaborating with other service providers can result in increased business opportunities and services for the destination and region.

Performance and Abilities

1. **create new professional contacts:**
   - seek relevant professional organizations at local, regional, national and international levels, e.g. industry associations
   - participate in activities that support organizational goals, e.g. attend events, present at conferences, volunteer for committee work, use professional social media networks
   - meet others, for example:
     - introduce self at events
     - use social media, e.g. join online forums, manage online presence
     - share business cards
2. **maintain working relationships:**
   - recognize areas of mutual interest, e.g. business trends
   - connect with contacts when appropriate:
     - follow up with new contacts in timely manner, e.g. telephone or email after conference
     - stay in touch with contacts as necessary, e.g. update business information
3. **build trust and respect with contacts, for example:**
   - exhibit professional conduct:
     - behave ethically, e.g. maintain confidentiality
     - present professional image, e.g. communicate effectively
     - maintain positive attitude
4. **evaluate networks regularly:**
   - look for opportunities to expand network strategically

Knowledge

1. **destination marketing practices**
2. **networking best practices**
3. **networking options on social media**
4. **organization's products and services**
5. **professional organizations with networking potential**
6. **relevant policies and procedures**

2.2.3 Use negotiation skills

Purpose

Negotiation skills help parties reach agreement about how they will participate in an activity together to achieve mutual benefit. Reaching an agreement that meets the needs and reflects the interests of all parties contributes to a positive and productive work relationship.

Performance and Abilities

1. **identify points of negotiation**
2. **explain personal view:**
   - convey interests and constraints
3. **listen actively to others' views:**
   - consider their interests and constraints
4. **determine main negotiating points**
5. **use emotional intelligence, for example:**
   - build rapport
   - gain trust
   - avoid responding negatively
   - consider motivation of other party
6. **address concerns, as applicable:**
   - discuss negotiable points
   - offer and support creative solutions
   - make realistic compromises, e.g. adapt approach
7. **determine mutually preferred outcomes:**
   - discuss how both sides will benefit
8. **discuss actions to be taken, for example:**
   - delegate responsibility
   - set deadlines
9. **ensure that issues have been addressed**

Knowledge

1. **conflict resolution techniques**
2. **job scope, including roles and responsibilities**
3. **negotiation best practices**
4. **principles of emotional intelligence**
5. **relevant policies and procedures**

2.2.4 Address conflicts

Purpose

The ability to address conflicts in a constructive manner is crucial to facilitating collaborative relationships. Addressing conflicts reduces tension, contributes to a positive work environment and can improve productivity and retention rates.

Performance and Abilities

1. **determine nature and extent of conflict, for example:**
   - talk to parties involved, witnesses and management
   - determine areas of agreement and disagreement
2. **determine time and place to address conflict**
3. **use communication skills, for example:**
   - listen actively, e.g. do not interrupt, do not assume
   - ask clarifying questions to identify root causes of conflict
   - use positive nonverbal cues and body language:
     - interpret body language and nonverbal cues of others
4. **use collaboration techniques, for example:**
   - be respectful, tactful and considerate of others
   - be empathetic, e.g. try to understand other party's point of view
   - show willingness to compromise
   - use variety of approaches to resolve issue:
     - change approach when necessary
   - find common ground for discussion, e.g. promote mutual understanding
   - be objective, e.g. do not get drawn into arguments
5. **negotiate with parties to determine solution:**
   - share possible options
   - work toward win-win solution
   - seek agreement on solution from all parties
6. **follow up, for example:**
   - ensure that conflict is resolved
   - document issue:
     - file document, e.g. on computer, in cabinet
   - notify others impacted by conflict and solution
   - review relevant organizational policies and procedures:
     - communicate any need for changes to policies and procedures to appropriate person

Knowledge

1. communication techniques, e.g. types of probing questions, types of nonverbal cues
2. conflict resolution strategies
3. factors that can lead to workplace conflict
4. relevant policies and procedures, e.g. respectful workplace
5. stages of conflict

2.3.1 Show initiative

Purpose

Showing initiative demonstrates a desire to achieve positive results. The ability to show initiative and be proactive are critical self-management skills that contribute to organizational productivity.

Performance and Abilities

1. **identify opportunities to be proactive, for example:**
   - recognize situations where services, products or work environment could be improved
   - identify extra opportunities to serve clients or co-workers
   - recommend improvements for policies and procedures
   - ask if there are more tasks to be done
2. **display initiative:**
   - work independently
   - plan tasks in most effective and efficient order
   - begin new tasks independently, when appropriate
   - seek out opportunities for continuous improvement
   - offer to help others before being asked

Knowledge

1. **job expectations, e.g. job description, supervisor's instructions**
2. **relevant policies and procedures**

2.3.2 Demonstrate adaptability

Purpose

In today's world of increasing diversity and change, it is important to be adaptable in both personal and professional situations. Adaptability is an important self-management skill because it helps practitioners accept that change is constant and thereby reduces their stress and improves their willingness to learn and take on new challenges.

Performance and Abilities

1. **be open to change, for example:**
   - seek to understand reasons change is necessary and its benefits
   - observe others who are adapting appropriately to change:
     - emulate effective behaviours
2. **deal constructively with unclear and confusing situations:**
   - ask for clarification
   - find out if more information is available
3. **shift strategy or approach in response to demands of situation:**
   - generate ideas about how to respond to unexpected situations:
     - collaborate with other practitioners to achieve consensus, whenever possible
   - share ideas with other stakeholders, when applicable:
     - be professional and accepting if ideas are rejected
4. **accept new tasks or roles with positive attitude, for example:**
   - ask questions to clarify requirements
   - seek out resources and assistance
5. **be open to opinions and feelings of others:**
   - identify opportunities as well as challenges
6. **seek continual learning and improvement:**
   - ask for direction from others
   - show willingness to learn new methods, procedures and techniques
   - learn from mistakes

Knowledge

1. causes of change in workplace, e.g. change in societal norms, new technology, decreased demand for current services, changes in legislation
2. emotional intelligence
3. importance of diversity in perspectives
4. importance of organizations and people adapting to changing circumstances to stay relevant and viable
5. relevant policies and procedures

2.3.3 Solve problems

Purpose

The ability to solve problems is an important skill for all practitioners to possess. Identifying problems and finding solutions in the face of obstacles can result in higher job satisfaction, saved time and increased productivity.

Performance and Abilities

1. **clarify nature of problem:**
    - gather facts, e.g. ask questions
    - engage all concerned parties
    - assess severity, for example:
        - short- and long-term impacts on organization, clients, other employees and self
        - safety hazards
        - costs
2. **consider root cause of problem**
3. **determine who should be involved in problem solving process**
4. **generate potential solutions, for example:**
    - brainstorm with those involved
    - consider new approaches for recurring problems
    - risks and benefits
    - consider short- and long-term results
    - review relevant policies and procedures
    - consider resources available, e.g. materials, equipment, time, money
5. **implement best solution:**
    - communicate required information to all parties involved
6. **document problem solving process, for example:**
    - details of issue
    - action taken
    - results
    - suggestions to avoid or resolve future problems, e.g. policy changes
7. **refer unresolved problems to supervisor or management team, according to organization's policy:**
    - provide details of situation and possible solutions

Knowledge

1. own scope of authority and that of other employees
2. previous problems and solutions
3. problem solving techniques
4. relevant legislation and regulations, e.g. occupational health and safety
5. relevant policies and procedures

2.3.4 Make decisions

Purpose

The ability to make good decisions increases the likelihood of positive outcomes. Effective decision making processes can encourage buy-in from stakeholders, increase morale, and contribute to the organization's mission and goals. The impact of decision making increases as practitioners' level of responsibility increases—decisions made by those in leadership positions have greater impact on the organization and its stakeholders than frontline positions. Poor decisions at the frontline level typically result in stress and inconvenience. Poor decisions at the management/executive level can lead to large financial losses and even an organization's failure. The failure to make decisions can be equally detrimental to the organization. Indecisiveness can negatively impact employee confidence in management and overall morale, and even stagnate organizational growth, development, and innovation.

Performance and Abilities

1. **review situation that requires decision:**
   - obtain additional information, if necessary:
     - ensure currency and validity of all information
   - assess time constraints
   - determine scope of situation, e.g. what aspects of organization are currently being impacted
2. **determine who should be involved in making decision and how:**
   - ensure appropriate stakeholders are consulted or included in decision making
   - provide necessary information
   - confirm authority and responsibilities of individuals involved
   - select type of decision making process to be used, e.g. command or consensus
3. **identify options:**
   - refer to previous experience, if relevant, for possible solutions
   - eliminate options that are not compatible with organization's:
     - mission, vision and goals
     - code of ethics/code of conduct
   - consider risks associated with options:
     - eliminate options that have too much risk
   - consider positive and negative impacts on organization's operations and finances, both short- and long-term
   - consider positive and negative impact on employees, clients and other stakeholders, both short- and long-term
   - weigh pros and cons of each option
4. **select best option**

5. **communicate decision to those affected:**
   - prepare to support decision if others disagree
6. **implement decision**
7. **accept accountability for decision made**
8. **evaluate implementation process and outcomes:**
   - prepare to reverse or amend decision if warranted
9. **document details of action taken, adjustments and outcomes**

Knowledge

1. **decision making responsibilities and authority of positions in organizational structure, including own**
2. **emotional intelligence**
3. **relevant policies and procedures, e.g. risk management, signing authority**
4. **types of decision making processes, e.g. command, consensus, vote**

2.3.5 Manage time and priorities

Purpose

Managing time and focusing on priorities results in greater productivity, increases profit for the organization and improves relationships on work teams.

Performance and Abilities

1. **determine tasks to be completed**
2. **estimate time each task will take, considering:**
   - previous experiences
   - other activities that compete for time
   - resources available
   - possible delays
3. **work efficiently:**
   - prioritize tasks based on importance and urgency
   - recognize limits
   - co-ordinate tasks with team members, e.g. share tasks that can be handled by others, share equipment and resources, as required
   - create timelines, if necessary:
     - identify critical dates and times
     - schedule tasks
   - break large tasks into smaller, manageable tasks
   - use checklists
   - concentrate efforts on priority tasks
4. **adjust process based on shifting priorities**
5. **monitor progress of tasks, for example:**
   - use calendar for long-term goals
   - mark checklist for shift end

Knowledge

1. **relevant policies and procedures, e.g. shift tasks**
2. **time management tools**

2.3.6 Manage stress

Purpose

Managing stress improves practitioners' wellbeing and relationships at work and at home. Organizations experience reduced absenteeism and turnover, as well as increased productivity.

Performance and Abilities

1. **identify effects of stress on personal physical and mental health**
2. **identify personal sources of stress:**
    - internal sources of stress, for example:
        - constantly feeling need to please others
        - worrying about decision to be made
        - worrying about mistake that was made
        - worrying about problems related to money or relationships
        - chronic pain or other health issues
    - external sources of stress, for example:
        - not enough time to complete tasks
        - conflicts between work and home commitments
        - changes in working conditions
        - demands of new technology
        - noisy or crowded commute to work
3. **use strategies to prevent stress, such as:**
    - contribute to positive work environment, for example:
        - communicate openly
        - offer solutions to problems
    - manage time and priorities
    - work toward work-life balance, for example:
        - include activities in schedule for family and personal life
    - ask for assistance when needed:
        - involve supervisor, if applicable and when appropriate, e.g. unfair treatment; challenges that may prevent work from being done on time
        - seek professional help, e.g. physician, counsellor
    - recognize own limitations and those of others:
        - recognize when to say no

4. **use strategies to reduce impact of stress, for example:**
    - use resources provided by organization, e.g. employee assistance program
    - access other resources, e.g. mental health organization, local counselling service
    - use relaxation techniques, for example:
        - breathing deeply
        - counting to ten
        - stepping away from situation for brief time
        - meditation
    - exercise self-control, for example:
        - demonstrate positive attitude
        - maintain perspective
        - use sense of humour
    - make changes in personal life, for example:
        - increase physical activity
        - play or listen to music
        - keep a journal
        - spend time with friends

Knowledge

1. **negative impacts of stress on self and others, e.g. inability to focus; feeling anxious, frustrated or irritated**
2. **relaxation techniques**
3. **resources and programs available to support health and wellness**
4. **strategies to maintain work-life balance**

2.3.7 Manage personal wellness

Purpose

Managing personal wellness encourages practitioners to rely on themselves, rather than others, and enables them to navigate difficulties in the workplace and experience long-term success in career and personal life.

Performance and Abilities

1. **be responsible for actions, for example:**
   - take responsibility for own decisions and behaviour, e.g. do not blame others for errors
   - correct errors
   - follow up on requests and promises
   - offer only what is possible
   - take on right amount of work for abilities and time available
2. **manage own work affairs, for example:**
   - plan each shift or day, for example:
     - identify deadlines or production goals
     - evaluate previous day to decide what follow-up to do, e.g. let supervisor and co-workers know about tasks that others will need to complete
     - set goals
     - list tasks to achieve goals
   - organize personal life, for example:
     - allow enough time to prepare for and travel to work
   - manage risk factors under one's control, for example:
     - avoid risky behaviour
     - follow organization's policies and procedures
3. **learn about own rights, for example:**
   - attend information sessions offered by organization
   - read notices on bulletin board
   - ask collective bargaining representative or union representative
   - refer to government websites
   - keep up to date with changes in laws
4. **advocate on own behalf, for example:**
   - express feelings, opinions and needs
   - be decisive, for example:
     - say no to requests that are not possible, explaining why

- set boundaries about how personal time is used
- report any bullying and harassment situations

5. **take charge of personal health and well-being, for example:**
   - manage time and priorities
   - manage stress
   - maintain healthy lifestyle, e.g. healthy eating habits, regular exercise, sufficient sleep

Knowledge

1. **impact of stress on well-being**
2. **importance of being one's own advocate**
3. **resources and programs available to support health and wellness, e.g. employee assistance program**
4. **rights and responsibilities in workplace, e.g. human rights, occupational health and safety**
5. **stress relieving strategies**

2.3.8 Develop professionally

Purpose

By developing their work-related knowledge and skills, practitioners are able to improve their performance and achieve work and career goals. Practitioners with enhanced knowledge and skills also help organizations reach their goals.

Performance and Abilities

1. **recognize ongoing need for professional development**
2. **reflect on own abilities and behaviours to engage in continuous learning, for example:**
   - reflect on current skills to identify strengths and areas for improvement
   - reflect on feedback from co-workers, supervisor and clients
3. **identify skills and knowledge to develop**
4. **use learning plan:**
   - set SMART learning goals
   - establish timeline
   - identify learning sources
   - ask for feedback on progress
5. **participate in formal training outside of or through work, for example:**
   - enroll in certification programs, if accreditation is goal
   - enroll in seminars, courses and workshops
   - pursue professional designations, if applicable
   - identify sources of funds or financial support for training
   - participate in mentorship programs
6. **participate in informal learning activities at work, for example:**
   - engage in cross-training with co-workers, e.g. within department, in other areas of organization
   - learn about new products, services, procedures, e.g. attend lunch-and-learn sessions, read online articles
7. **participate in professional organizations, local trade and business organizations:**
   - read professional journals and industry publications
   - volunteer, e.g. help with events in community
   - network with industry members
8. **share knowledge and skills with fellow practitioners**
9. **track professional development activities to build portfolio of learning experiences**
10. **identify opportunities to apply formal and informal learning on the job**

Knowledge

1. development opportunities
2. networking techniques
3. professional associations related to career goals
4. relevant policies and procedures, e.g. performance reviews, employee learning and development
5. SMART goals, i.e. specific, measurable, achievable, realistic and timely
6. sources of support for professional development, e.g. organization’s programs, grants, scholarships

2.3.9 Demonstrate spatial awareness

Purpose

Demonstrating spatial awareness in the workplace enables practitioners to have knowledge and perception of their environment and the people and objects in it. Spatial awareness can prevent injuries, accidents and other types of undesirable situations from occurring. Having practitioners who protect their own safety, as well as that of co-workers and clients is critical to successful operations.

Performance and Abilities

1. **be aware of work environment:**
   - familiarize self with equipment, procedures and physical set-up of work environment when working in new space, for example:
     - in office setting, identify where furniture and equipment are located
     - in restaurant setting, identify stationary and moving objects that need to be navigated in kitchen and dining area
     - in outdoors setting, establish landmarks and other visual cues to prevent becoming lost
   - identify location of hazards before starting new task
   - pay attention to immediate surroundings, for example:
     - be aware of what is happening around you
     - study how objects and people move through environment
2. **follow directional flow of services, e.g. one way in, one way out; drop off points**
3. **use senses to anticipate movement of objects in environment, for example:**
   - use visual cues to see what is happening
   - listen carefully to hear if someone or something is approaching
4. **stay alert to changes in environment, for example:**
   - use sense of touch to detect movement in objects being held
   - keep eyes on travel path or task at hand
5. **keep senses sharp, for example:**
   - protect ears to avoid hearing damage
   - practice balancing positions to avoid falls
6. **take precautions when moving, for example:**
   - avoid rushing
   - minimize trip hazards, e.g. keep work areas clean and unobstructed
   - practice safe work habits

Knowledge

1. directional flow of services in workplace, e.g. pick up and drop off, entry and exit points
2. physical self-awareness
3. relevant policies and procedures
4. relevant standard operating procedures
5. safe work practices and habits for practitioners and clients
6. standard operating
7. typical objects and movements in relevant work environments, e.g. forest, streets, hotel lobby, kitchen, office

3.1.1 Listen actively

Purpose

Active listening involves two-way communication where the listener, in addition to listening carefully to the speaker, provides feedback and asks questions to fully understand the message. Having an accurate understanding of someone's message allows practitioners to increase productivity, as well as their ability to influence and negotiate. In addition, active listening helps them to avoid and manage conflict.

Performance and Abilities

1. **be attentive:**
    - avoid interrupting speakers while they are talking
    - avoid distractions, e.g. put phone in silent mode, set aside other tasks
    - be aware of speakers' body language and tone of voice
2. **ask open-ended questions**
3. **probe to clarify information provided and seek additional information, e.g. "Tell me more about…"**
4. **reflect meaning of what speakers have said:**
    - repeat or paraphrase key points to demonstrate understanding
    - mirror feeling and emotion
    - refrain from making assumptions, stereotyping or discrimination:
        - do not question speaker's feelings
        - do not introduce own ideas at this time
        - remain non-judgmental and non-directive

Knowledge

1. **active listening techniques**
2. **communication etiquette, e.g. remaining calm, being polite**
3. **importance of using clear and simple language**
4. **messages conveyed by different types of body language**
5. **relevant policies and procedures, e.g. active participation in meetings**
6. **variety of perspectives and communication styles among people**

3.1.2 Communicate verbally

Purpose

Effective verbal communication results in a message that is clear and received as intended by the speaker. Practitioners unable to use verbal communication effectively are likely to experience misunderstandings with their clients and co-workers.

Performance and Abilities

1. **prepare before speaking:**
    - identify purpose of message
    - anticipate how message will be received by listener
    - consider needs and expectations of listener
    - determine appropriate time and place to deliver message
2. **use inclusive language wherever possible, e.g. gender-neutral terms, culturally appropriate terms**
3. **present clear message, for example:**
    - enunciate words
    - use correct grammar and sentence structure
    - provide thoughts in logical order
4. **vary tone, volume, inflection and rate of speech**
5. **display appropriate nonverbal behaviour, for example:**
    - make eye contact with listeners
    - ensure body language matches oral message, e.g. smile when welcoming clients, point arm in appropriate direction when giving directions
6. **minimize distractions when communicating, e.g. choose quiet location**
7. **adjust message based on context and feedback from listeners, e.g. shorten conversation if cues from listeners indicate they are becoming restless**
8. **confirm listeners' understanding, e.g. ask questions**
9. **use communication equipment, when necessary, for example:**
    - speaker systems
    - visual presentation devices
    - video conferencing

Knowledge

1. active listening techniques
2. communication etiquette, e.g. use professional language, that is, void of swearing, slang and angry words
3. elements of body language, e.g. eye contact, physical proximity to listeners, arm movements
4. importance of providing current, accurate, clear and concise information
5. needs and expectations of listeners

3.1.3 Communicate in writing

Purpose

Written communication allows writers to refine their messages and readers to study them and they allow both parties to file them for future reference. Well written communication minimizes misunderstandings and improves productivity.

Performance and Abilities

1. **prepare to write message:**
   - identify purpose of message
   - select format suited to purpose, e.g. email, letter, report
   - consider how message will be received by audience
   - consider needs and expectations of audience
   - identify tone and style appropriate to context
2. **use inclusive language wherever possible, e.g. gender-neutral terms, culturally sensitive terms**
3. **draft message, for example:**
   - present thoughts in logical order
   - use accurate spelling, punctuation and grammar
   - employ proper sentence and paragraph structures
   - eliminate words that serve no purpose
4. **review draft message to ensure:**
   - information meets needs and expectations of audience
   - information is accurate
   - writing is clear and concise
5. **proofread before sharing message:**
   - ask co-worker or appropriate individual to also proofread

Knowledge

1. **communication etiquette, e.g. professional language that is void of swearing, slang and angry words**
2. **formats of written communication (e.g. email, letter, report) and their purpose and guidelines**
3. **importance of providing current, accurate, clear and concise information**
4. **needs and expectations of audience**
5. **proper grammar, spelling and word usage**
6. **relevant policies and procedures, e.g. information and record management**
7. **writing tools, e.g. word processing software, pen and paper, dictionary**

3.1.4 Conduct meetings

Purpose

Meetings allow for greater understanding among attendees because they permit discussion and expression of nonverbal communication (e.g. nodding, smiling) that help attendees communicate their own message and better understand the messages of others. However, a meeting that is poorly planned and facilitated can result in wasted time, poor results, decreased job satisfaction and increased stress.

Performance and Abilities

1. **determine details of meeting:**
   - consult with relevant parties on purpose, time, location, medium (e.g. in-person, web conference) and list of attendees:
     - consider differences in time zone, availability and accessibility to technology for web or telephone conference
   - accommodate unique needs of attendees
   - ask someone to record meeting decisions and action items, if appropriate
2. **prepare agenda and materials in accordance with purpose of meeting and organization's policies:**
   - distribute to attendees in advance or at meeting, as appropriate
3. **open meeting:**
   - review purpose, agenda, desired outcomes and allocated time
4. **facilitate discussion during meeting:**
   - acknowledge all points of view:
     - give all attendees opportunity to participate
   - establish tone of meeting by modelling open, constructive, clear and concise communication:
     - remind attendees to communicate in desired manner, as needed
   - use consensus approach for decision-making
   - maintain meeting focus:
     - refer to agenda items and timelines, as needed
   - use facilitation strategies to resolve difficult situations, e.g. summarize discussion, ask silent attendees to share opinion
5. **finish meeting within agreed time:**
   - reschedule or extend meeting with agreement of attendees, if items on agenda not completed
6. **follow up, for example:**
   - distribute documentation from meeting, e.g. files, meeting minutes, recorded video
   - share outcomes of meeting with others, as appropriate
   - update work schedule and plan according to decisions made at meeting

Knowledge

1. conflict resolution techniques
2. facilitation strategies, e.g. brainstorming, reaching consensus, controlling input from domineering attendees
3. group dynamics
4. meeting communication tools and equipment and how to use them, e.g. web conferencing software, slideshow applications, projectors
5. meeting set-ups, e.g. boardroom style, standing meeting, computer microphones and cameras on or off during web conference
6. relevant policies and procedures, e.g. meeting protocol, recording minutes

3.1.5 Demonstrate cross-cultural communication

Purpose

The character of many of today's workplaces includes people of diverse backgrounds, where cross-cultural communication is essential to maintaining team morale and productivity. Working with and providing excellent customer service to co-workers and clients from all over the world requires an understanding and appreciation of cultural differences.

Performance and Abilities

1. **practice effective communication techniques, e.g. active listening, speaking and writing clearly**
2. **create safe environment for sharing different viewpoints, for example:**
   - build trust, e.g. consider perspectives of others with open mind, share own perspective without expecting others to agree
   - withhold judgement
3. **research customs and behaviours of different cultures**
4. **recognize cultural differences in communication, for example:**
   - format of greetings, e.g. handshake, bow, common phrases used
   - amount of eye contact made
   - importance of establishing personal relationship
   - desire to know reasons for requested action before performing it
5. **show respect for cultural differences:**
   - adopt some of co-workers' and clients' cultural practices when interacting with them, for example:
     - bow in response to their bow
     - use less eye contact if they avoid eye contact
     - greet them in their first language
6. **try different methods to communicate messages, e.g. draw a map, point arm in correct direction**
7. **seek assistance, for example:**
   - ask co-worker with same cultural background and language to assist
   - ask for support services, e.g. interpreter, translation application for mobile device

Knowledge

1. barriers to cross-cultural communication, e.g. lack of understanding, inclination to judge
2. communication techniques
3. cultural practices, e.g. customs, celebrations, greetings, giving gifts, communication preferences
4. importance of understanding and adapting to cultural differences
5. organizational relevant policies and procedures, e.g. communication protocol, customer client service
6. translation tools and applications

4.1.1 Practice inclusion of others

Purpose

When tourism practitioners accept diversity and practice inclusion, they contribute to productive relationships with co-workers, clients, suppliers and others they interact with. Doing this helps to create a healthy and safe workplace and increase a sense of belonging for all.

Performance and Abilities

1. **respond constructively to policies and procedures related to diversity and inclusion:**
   - ask for clarification, if necessary
   - share relevant examples
   - contribute to implementation
   - focus on shared sense of purpose, e.g. fairness and equity in workplace, team goals, sense of belonging at work
2. **build self-awareness:**
   - understand personal strengths and weaknesses
   - consider own biases, and impact on perspectives and behaviour
   - be open to feedback from others
   - consider being wrong
3. **continue learning about diversity and inclusion, e.g. communicate with others from diverse backgrounds:**
   - seek to understand, and be open to, different perspectives
   - treat others as they want to be treated
   - reflect on how others' experiences have shaped their perspectives and opinions
4. **model inclusive behaviour, for example:**
   - be open and approachable, e.g. make others feel welcome and safe
   - initiate conversations using safe topics, e.g. food, weather, hobbies
   - demonstrate respect and acceptance
   - be empathetic, e.g. be sensitive to how others may be feeling
   - treat others fairly and reasonably
   - acknowledge contributions of others
5. **use inclusive language and communication techniques, for example:**
   - confirm preferred terms of address
   - ensure body language matches verbal messages
   - use neutral language
   - focus on individual rather than stereotypes

- seek aid from co-workers who speak other languages
- ask open-ended questions
- listen actively
- use different ways to present information, e.g. verbal, written, pictorial, tactile
- leave space in conversation for other to process and respond

6. **correct negative messages or actions (i.e. those that devalue, discourage or impair workplace relationships or performance) in nonaggressive ways, for example:**
   - reflect on own reactions and feelings, e.g. do not make assumptions
   - state how other's actions make you feel, i.e. address behaviour, not person, e.g. "I was hurt when my idea was ignored."
   - describe expectations for future, e.g. "I would like to see us work together to …"

Knowledge

1. **assertive communication tactics, e.g. use of clear, direct, respectful language**
2. **benefits of diversity and inclusion to self and co-workers**
3. **constructive methods for giving and receiving feedback**
4. **cultural differences**
5. **diversity and inclusion strategies, e.g. dimensions of diversity**
6. **methods of increasing self-awareness, e.g. of own values, beliefs, cultural conventions and language use**
7. **organization's values, culture and mission statement**
8. **relevant legislation and regulations, e.g. human rights**
9. **relevant policies and procedures, e.g. employee conduct**
10. **systemic and individual barriers that cause exclusion, e.g. biases, prejudice, stereotypes, policies, societal norms**

5.1.1 Comply with policies and procedures

Purpose

Policies and procedures clarify expectations and protect employees and the organization. Compliance with organizational policies and procedures ensures that employees and operations are meeting legal responsibilities. The impacts of noncompliance include reduced safety, productivity and overall performance as well as increased organizational and personal risk and liability.

Performance and Abilities

1. **review organizational policies and procedures relevant to position, for example:**
    - onboarding training information
    - resources provided by organization, e.g. employee manual/handbook
2. **participate in organizational training related to policies and procedures, e.g. employee rights and responsibilities**
3. **identify procedures for work, e.g. review standard operating procedures (SOPs)**
4. **seek clarification from supervisor, management or authorities as required**
5. **conduct work activities according to policies and procedures, e.g. use checklists**
6. **raise compliance issues to protect organization's obligations and reputation, e.g. out of date SOPs, procedural conflicts**
7. **stay up to date on changes to policies and procedures:**
    - attend training sessions
    - read memos and newsletters
    - attend employee meetings
    - acknowledge updates, e.g. sign off on memos
8. **provide input and feedback on policies and procedures:**
    - identify challenges and opportunities for improvements

Knowledge

1. **importance of complying with policies and procedures**
2. **information sources, e.g. employee manual/handbook, policies and procedures, SOPs, checklists**

5.1.2 Comply with legislation and regulations

Purpose

All employees are responsible for complying with legal requirements that apply to their tasks. Compliance with legislation protects the organization's employees, clients, partners and community. The impacts of noncompliance include reduced safety and increased organizational and personal risk and liability.

Performance and Abilities

1. **identify types of legislation and regulations that apply to organization, role or activity/event, as required:**
   - identify relevant jurisdictions, e.g. local/district, provincial, federal
   - locate applicable legislation and regulations, e.g. Internet search, ask supervisor
2. **participate in training related to legislation and regulations**
3. **seek clarification from supervisor, management or authorities, as required**
4. **apply legislation and regulations to activities, e.g. follow requirements for alcohol service, obtain permits, protect client privacy**
5. **communicate relevant legislation and regulations to team members and clients, e.g. hand out copy of hunting regulations:**
   - explain consequences of non-compliance, if applicable
6. **stay up to date on changes to legislation and regulations, e.g. read current news sources**
7. **cooperate with inspectors and officials, as required, e.g. answer questions, provide documentation**
8. **communicate compliance issues to team members, supervisors and/or managers, as required, e.g. report violations to appropriate agency, identify out-of-date/non-compliant standard operating procedures (SOPs)**

Knowledge

1. **implications of illegal activities, e.g. court case, fine, loss of licence**
2. **sources of relevant legislation and regulations**

6.1.1 Assess potential hazards

Purpose

Properly assessing potential hazards is critical to reducing the risk of injuries, illnesses and accidents, as well as protecting the safety of those in the workplace (e.g. employees, clients, volunteers, owners).

Performance and Abilities

1. **gather information on potential hazards, for example:**
   - conduct walk-through of workplace/site
   - observe performance of tasks
   - discuss safety concerns with others, e.g. conservation officers, employees
   - assess applicable information, e.g. weather forecasts, news, wildlife activity
   - inspect equipment, e.g. personal protective equipment (PPE), machinery, tools, survival clothing and kits
   - review incident and near miss reports, e.g. trends, types of injuries, frequency
   - review industry trends, e.g. potential cyber hazards
2. **analyze findings, considering, for example:**
   - probable causes, e.g. improper use of equipment, defective tools
   - likelihood of occurrence or recurrence
   - severity of risk
   - underlying hazards and trends
3. **consider preventative and corrective actions to minimize or eliminate risk, for example:**
   - develop new, or revise, standard operating procedures (SOPs) and safe working practices
   - modify work processes
   - identify new training needs
   - deliver refresher training
   - upgrade equipment
4. **document findings**
5. **file document, e.g. on computer, in cabinet**
6. **update document, e.g. as scheduled, annually**

Knowledge

1. **basic fire safety information, e.g. components of fire triangle, classes of fire**
2. **evacuation plan**
3. **location of emergency facilities, e.g. hospital, medical clinics**
4. **relevant legislation and regulations, e.g. occupational health and safety**
5. **relevant policies and procedures**
6. **research methods, e.g. data collection and analysis**
7. **risk management techniques**
8. **roles of emergency personnel, e.g. fire warden, first-aiders**
9. **types of workplace hazards, for example:**
   - biological, e.g. bacteria, parasites, viruses
   - chemical, e.g. fumes, explosive reactions, exposure
   - environmental, e.g. unstable ground, dangerous wildlife, weather
   - physical, e.g. noise; electricity; temperature; ergonomic, such as repetitive movements and poor workstation design
   - psychological, e.g. violence, harassment, stress
   - safety, e.g. unsafe working conditions and practices, faulty equipment

6.2.1 Follow safe work practices

Purpose

Following safe work practices helps to prevent injuries and reduce illnesses.

Performance and Abilities

1. **maintain required credentials, e.g. keep certifications up to date, participate in training**
2. **follow Workplace Hazards Materials Information System (WHMIS) guidelines and standard operating procedures (SOPs), e.g. food safety and sanitation practices**
3. **be prepared to use emergency and safety equipment (e.g. fire extinguishers, first aid kit) when necessary**
4. **follow fire safety requirements, for example:**
   - keep kitchen hoods and other equipment free from grease build-up
   - keep fire stairs and exits clear
   - keep fire doors closed
   - report use of fire extinguisher to supervisor
   - smoke only in designated areas
5. **prevent injuries, for example:**
   - follow safe lifting, carrying, bending and reaching practices, e.g. gain firm footing, ask for assistance, use ladders
   - ensure adequate lighting for tasks
   - prevent repetitive movements, e.g. rotate tasks
6. **do not put self or others at risk, for example:**
   - avoid working while impaired
   - provide safety instructions to clients
   - prevent robberies and assaults, e.g. keep cash hidden, use buddy system
   - walk; do not run
   - inspect workspace and equipment, e.g. ensure equipment is safe to use, ensure safety guards are in place
   - clarify expectations or unclear points to ensure understanding, i.e. avoid acting on assumptions
   - eliminate potential hazards, e.g. clean spills promptly, use signs to mark wet areas, keep floors free of debris and clutter, report maintenance needs
   - report situations that could result in harm to self or others, e.g. hazards, unsafe practices, injuries, illnesses, near misses, suspicious activity
   - do not perform tasks that are unusually dangerous or unsafe
7. **notify designated responders (e.g. floor fire marshal) when necessary**
8. **collaborate in incident investigations, as required**

Knowledge

1. components of fires, e.g. classes, fire triangle
2. location of emergency equipment, e.g. heart defibrillator, first aid kit
3. organization's health and safety program, e.g. roles and responsibilities of employees
4. relevant legislation and regulations, e.g. WHMIS hazard symbols, safety data sheets (SDS)
5. relevant policies and procedures, e.g. standard operating procedures (SOPs)
6. risk management techniques
7. trained personnel, e.g. fire warden, first aiders

6.2.2 Operate equipment safely

Purpose

Operating equipment safely is essential in preventing injuries to self and others.

Performance and Abilities

1. **use equipment only when and as authorized to do so**
2. **follow manufacturers' operating manuals and instructions for use, e.g. intended use only, use safety guards, avoid pinch points**
3. **have proper training before operating equipment**
4. **do not disturb those using equipment**
5. **dress appropriately, e.g. wear personal protective equipment (PPE), refrain from wearing dangling jewellery or loose clothing**
6. **keep extremities, tools and utensils away from moving parts**
7. **inspect workspace and equipment prior to use, for example:**
   - ensure safety guards are in place
   - check for signs of wear or damage, e.g. frayed cord
   - verify that equipment is properly assembled
   - verify that machinery is in safe working order
   - adjust or report, as required
8. **identify issues that become evident while using equipment, e.g. smoking motor, digital radio not working:**
   - handle problem, as required, for example:
     - remove equipment from service
     - identify as not safe for use, e.g. lock-out, tag-out, identify as unserviceable
     - seek repairs
9. **turn equipment off when not in use**
10. **perform maintenance and cleaning as per manufacturers' specifications, for example:**
    - turn off equipment and disconnect power source before servicing or cleaning
    - use proper tools, e.g. clean griddles with grill stone
    - follow sanitation standard operating procedures (SSOPs)
11. **report misuse of equipment and faulty/broken equipment**
12. **document maintenance, as required:**
    - file maintenance records, e.g. on computer, in cabinet

Knowledge

1. equipment parts and functions
2. operation of equipment and machinery, e.g. manufacturers' specifications
3. relevant legislation and regulations, e.g. occupational health and safety
4. relevant policies and procedures, e.g. organization's documentation procedures, standard operating procedures (SOPs) for operation and cleaning of equipment
5. risk management techniques
6. type of equipment, e.g. electrical, hydraulic, mechanical, pneumatic, digital

6.2.3 Handle hazardous materials

Purpose

Hazardous materials must be handled properly in order to prevent injuries to self and others, as well as to protect the organization and environment.

Performance and Abilities

1. **follow safe handling procedures, for example:**
    - adhere to safety data sheet (SDS) guidelines, e.g. dilute only as directed
    - wear recommended personal protective equipment (PPE), e.g. gloves, eye protection
    - prevent inhalation of fumes, e.g. use mask or foam nozzle
    - use only approved containers when transferring products
    - keep empty containers closed to contain residue and odours
    - follow procedures for disposing of flammable waste, e.g. oil, greasy rags
    - keep flammable objects away from flames
    - do not store incompatible chemicals together
2. **manage spills/accidental releases of hazardous materials:**
    - identify type and extent of spill/accidental release, e.g. localized spill vs. release of chemical into waterway
    - isolate hazard, if possible
    - notify supervisor of spill/accidental release, if required
    - arrange for cleanup of spill/accidental release
3. **follow storage procedures for hazardous materials:**
    - report issues (e.g. signs of damage or leaks) to supervisor
4. **complete documentation, as required, e.g. use of hazardous materials:**
    - file document, e.g. on computer, in cabinet

Knowledge

1. **organization's health and safety program, e.g. roles and responsibilities of employees, staff members trained in first aid, locations of emergency equipment**
2. **potential hazardous materials, e.g. gases; explosives; flammable or combustible liquids; biohazardous/infectious materials, including bodily fluids and excrement; oxidizing materials; corrosive materials**
3. **relevant legislation and regulations, e.g. occupational health and safety, Workplace Hazardous Materials Information System (WHMIS)**
4. **relevant policies and procedures, e.g. response procedures for spills or accidental releases, standard operating procedures (SOPs)**
5. **risk management techniques**

6.2.4 Safeguard client safety

Purpose

Safeguarding clients involves identifying situations that might put clients' safety at risk, and then taking action to reduce those risks to better protect clients from illness, injury and death.

Performance and Abilities

1. **review products and services to identify possible safety issues, e.g. possibility of falls, exposure to elements, wildlife encounters, food contamination**
2. **assess likelihood (e.g. high, moderate, low) of issue and possible harm, for example:**
   - life threatening or serious, e.g. necessitating call to 911
   - requiring assistance, e.g. support with onsite staff
   - minor injury, e.g. offer ice pack
3. **develop relationships with emergency service providers and personnel, e.g. fire department, police, wildlife conservation officers:**
   - develop mutual understanding of services provided
   - establish protocols for response
4. **take action to increase client safety, for example:**
   - inform client of potential harm, e.g. detail possible issues in waiver for client to read and sign
   - assess client's needs and abilities, e.g. dietary needs, required physical condition, medical information
   - provide safety equipment, e.g. helmet, personal floatation device (PFD)
   - instruct client, e.g. demonstrate use of personal protective equipment (PPE), discuss contingency plans
   - state expectations, e.g. stay on path, watch for traffic when disembarking vehicle
   - adhere to alcohol service regulations, e.g. do not overserve
5. **address client's unsafe behaviour:**
   - remain calm
   - take client aside
   - identify undesirable behaviour
   - state company policy and consequences of noncompliance
   - consider motivation or reasons for behaviour, e.g. misunderstanding or confusion
   - ask client to discontinue behaviour
   - ask for assistance, if required, e.g. escalate issue to supervisor
   - ensure personal safety, e.g. withdraw if client becomes volatile
   - if undesirable behaviour continues:
     - take action to correct behaviour, e.g. redirect client to appropriate walking path, cancel activity
     - seek assistance, as necessary, e.g. call supervisor, security and/or police

6. address illegal activities appropriately and immediately, e.g. call police or wildlife conservation officers
7. document incidents, for example:
    - note issue and action taken
    - ask witnesses to sign statement
8. file documents, e.g. on computer, in cabinet

Knowledge

1. conflict resolution techniques, e.g. de-escalation techniques for addressing unsafe behaviours
2. location and details of emergency preparation plan
3. locations of emergency facilities, e.g. hospital, medical clinic
4. organization's health and safety program, e.g. location of communication and signaling equipment, location of first aid and survival kits
5. relevant legislation and regulations, e.g. occupational health and safety
6. relevant policies and procedures

6.3.1 Respond to emergency situations

Purpose

Proper response to an emergency can stabilize a situation, protect self and others from injury or possible death, and help to eliminate or ease safety and security issues.

Performance and Abilities

1. **recognize signs of problem or potential emergency situation, e.g. smoke, alarms, yelling, weather advisories**
2. **remain calm**
3. **use emergency plan training**
4. **assess situation:**
    - determine type of emergency, e.g. medical, chemical, fire, violence, terrorism
    - identify potential hazards, e.g. smoke inhalation, physical threat, unstable building
5. **apply relevant policies and procedures, e.g. from fire response plan or violence response plan**
6. **determine ability to assist others, e.g. certified in first aid, crisis management training**
7. **respond to immediate issues if safe to do so, for example:**
    - call 911:
        - provide requested information
        - follow instructions given
    - activate fire alarms
    - assist individuals that require help, e.g. guide to nearest exit
    - check washrooms and client areas
    - extinguish small/contained fires
    - address medical emergencies, for example:
        - determine person's ability to respond, e.g. ask questions or squeeze ear lobe gently to gain reaction of eyes fluttering, body movement or groan
        - keep person still, quiet and warm
        - remain with person until arrival of emergency personnel
        - perform first aid, if certified to do so, until emergency assistance arrives, for example:
            - check for signs of shock, broken bones or fracture
            - perform rescue breathing or cardiopulmonary resuscitation (CPR)
            - apply direct pressure to bleeding wound
8. **stay alert, e.g. react to unfolding events**

9. **determine whether to shelter-in-place or evacuate to safe location:**
    - apply relevant policies and procedures, for example:
        - if evacuating: leave belongings behind, help others leave, prevent others from entering area
        - if sheltering-in-place: close, lock and barricade door; take cover or hide under desk or in closet; keep away from doors and windows; leave only when instructed to do so by emergency personnel
10. **provide guidance and reassurance to others, within own abilities**
11. **conduct post-incident activities:**
    - protect privacy of casualties, e.g. do not discuss incident with co-workers or clients
    - document details, e.g. date, time, nature of emergency, time authorities arrived, witness information
12. **follow up as requested by management, for example:**
    - suggest recommended action to prevent reoccurrence
    - follow revised action plan

Knowledge

1. **decision making and problem solving techniques**
2. **evaluation methods**
3. **fire extinguisher use, i.e. PASS:**
    - **P**ull pin
    - **A**im extinguisher
    - **S**queeze trigger (or release retardant following manufacturer's instructions)
    - **S**weep from side to side
4. **post-incident activities**
5. **relevant legislation and regulations, e.g. occupational health and safety, good Samaritan law for jurisdiction**
6. **relevant policies and procedures, e.g. emergency plan**
7. **relevant standard operating procedures (SOPs)**
8. **types of emergencies, for example:**
    - natural, e.g. avalanches, floods, earthquakes, landslides, extreme weather, wildfire
    - environmental, e.g. hazardous material spills
    - social/political, e.g. acts of terrorism, crime, riots, bomb threats
    - health-related, e.g. epidemics, severe pain, difficulty breathing, bleeding
    - technological, e.g. power outages, water disruptions

6.4.1 Protect food and beverages from contamination

Purpose

By protecting food and beverages from contamination, organizations help to protect the health of practitioners and of clients, which can in turn encourage repeat business and support organizational success.

Performance and Abilities

1. **maintain personal hygiene:**
    - wash hands:
        - wet hands
        - apply soap
        - lather hands for at least 20 seconds:
            - clean all skin and nail surfaces thoroughly
        - rinse hands
        - dry hands, e.g. use single-use towel or hand dryer
        - use clean towel or tissue to turn off tap
    - wear disposable gloves, e.g. to cover open sores, to prevent contamination
    - keep hands away from face and hair
    - keep hair clean, neat, and pinned back if necessary
    - wear scents appropriately, e.g. in keeping with organization's policies
2. **follow policies for proper use of uniform, e.g. start shift with clean uniform, do not wear when socializing off-site**
3. **do not work when sick**
4. **store or dispose of personal protective equipment (PPE) properly, e.g. in designated area**
5. **prevent cross-contamination, for example:**
    - do not allow food products on separate plates to touch each other, e.g. gluten to touch non-gluten meal
    - keep dirty and clean dishes separate, e.g. do not allow contact
    - avoid personal direct contact with food and beverages, e.g. do not touch with hands
    - handle tableware according to guidelines, for example:
        - handle glassware by base or stem only, even when removing from tables
        - touch handle of cutlery only
        - touch plate rim and base only
        - handle china with cloth
        - hold cups by base or handle only

6. follow standard operating procedures (SOPs) for cleaning and sanitizing, for example:
   - be sure food preparation areas are properly cleaned/sanitized and dried before use
   - use clean and/or sanitized utensils and kitchen tools to handle food
   - prevent cleaning products from contacting food and beverage products
7. follow Workplace Hazardous Materials Information System (WHMIS) and safety data sheet (SDS) guidelines when handling hazardous materials, e.g. mix and use chemicals well away from open food and beverages
8. dispose of spoiled or unsafe foods properly, e.g. add to compost, seal in trash bins
9. notify supervisor immediately if client complains of potential food- or beverage-related illness
10. enforce good personal hygiene habits, e.g. remind co-workers

Knowledge

1. consequences of cross-contamination
2. factors affecting growth of food-related bacteria
3. items susceptible to contamination
4. manufacturers' recommendations and specifications, e.g. for sanitizing chemicals
5. principles of food hygiene
6. relevant legislation and guidelines, e.g. Canada's Food and Drugs Act and Regulations, WHMIS, SDS
7. relevant policies and procedures, e.g. sanitation, public health
8. sanitation standard operating procedures (SSOPs)

6.4.2 Sanitize preparation areas

Purpose

Sanitizing preparation areas is critical in the prevention of foodborne illnesses. Microorganisms (e.g. bacteria, germs) can grow on unsanitary surfaces and can then contaminate food. Surfaces may look clean without being sanitary, so sanitizing is important for food and beverage safety and quality.

Performance and Abilities

1. **wear appropriate personal protective equipment (PPE), e.g. eye protection, gloves, mask**
2. **pre-clean preparation area:**
   - remove food scraps
   - rinse with water
3. **clean preparation area:**
   - remove grease and food residue with hot water and detergent
   - soak, if necessary
   - rinse to remove detergent and loosened residue
4. **disinfect preparation area:**
   - use sanitizer according to organization's policies and procedures:
     - follow manufacturers' instructions
     - follow Workplace Hazardous Materials Information System (WHMIS) and safety data sheet (SDS) guidelines
   - store remaining sanitizer according to instructions
5. **dry preparation area, e.g. air dry, use single-use towels**
6. **document sanitizing procedures, as required**

Knowledge

1. **factors affecting growth of food-related bacteria**
2. **manufacturers' recommendations and specifications, e.g. for sanitizing chemicals**
3. **potential risks and hazards, e.g. foodborne illnesses**
4. **relevant legislation and regulations, e.g. WHMIS and SDS guidelines**
5. **relevant policies and procedures, e.g. storage procedures for hazardous substances**
6. **sanitation standard operating procedures (SSOPs)**

7.1.1 Reduce pollution and waste

Purpose

Canada's environment is key to the success of our tourism industry; therefore, it is important that operators serve as environmental ambassadors by ensuring that organizations minimize pollution and waste, and by mitigating negative impacts on the environment.

Performance and Abilities

1. **identify sources of pollution (e.g. greenhouse gases, carbon emissions, heating systems) and waste, e.g. single-use items; paper collateral, such as pamphlets and programs:**
   - assess organizational practices periodically, e.g. monthly, annually, post-project
   - participate in internal or external audit
2. **address pollution, for example:**
   - decrease light pollution:
     - follow Royal Astronomical Society of Canada (RASC) light-pollution abatement guidelines
   - decrease noise:
     - reduce noise volume
     - use noise-isolating materials
   - decrease soil pollution:
     - use pesticide-free food sources
     - use natural or organic options for landscaping or pest control
   - decrease waste, for example:
     - install recycling and composting stations:
       - store items in designated bins or areas, e.g. used batteries or light bulbs, obsolete appliances
     - reduce paper use
     - eliminate use of single-use items, e.g. water bottles, cutlery
     - repair equipment to increase longevity
     - donate excess food to groups in need
     - reuse or compost food scraps
   - decrease emissions, for example:
     - use eco-friendly transportation options, e.g. bike rentals, car sharing, shuttles
     - use cleanest and most resource-efficient transport, e.g. hybrid/electric vehicles
     - minimize use of single-occupancy vehicles
     - choose local suppliers
     - promote plant-based alternatives on menus

3. **ensure proper disposal of wastewater:**
    - ensure suitable treatment on-site, if suitable municipal wastewater treatment is not available
4. **use environmentally-preferred products, when possible, e.g. cleaning solutions**
5. **handle hazardous materials safely**
6. **offset pollution, for example:**
    - purchase carbon offsets from accredited organizations
    - purchase renewable energy, e.g. solar, wind, biomass
    - plant trees, grasses and flowers
    - compost
7. **engage co-workers, suppliers and clients in organization's reduction of pollution and waste practices, for example:**
    - explain practices and rationale
    - discuss innovations
8. **recommend changes to sustainability management plan, as required**

Knowledge

1. **available wastewater treatment options and waste management operations**
2. **efficient transportation opportunities**
3. **environmentally sustainable practices and approaches, e.g. tourism sustainability standards**
4. **financial benefits of environmentally friendly practices**
5. **forms of pollution, e.g. light, noise, soil**
6. **methods for measuring, monitoring and reducing emissions and waste**
7. **organization's sustainability management plan**
8. **pollution offset options**
9. **potential environmental impact of activities**
10. **principles of minimum impact tourism**
11. **relevant legislation and regulations, e.g. Workplace Hazardous Materials Information System (WHMIS), environmental**
12. **sources of greenhouse gases, carbon emissions and waste**

7.1.2 Reduce human impact on wildlife and habitat

Purpose

Wildlife and habitat are often key resources for tourism and can be negatively impacted by the movements and behaviours of people. Tourism operators should manage human interaction with flora, fauna and habitat in a responsible and respectful way so that the resource can prosper and clients' experiences be enhanced.

Performance and Abilities

1. **identify impacts on wildlife and habitat:**
    - assess organizational practices periodically, e.g. monthly, annually, post-project
    - participate in internal or external audit
2. **collaborate with communities**
3. **comply with laws, regulations, guidelines and policies regarding wildlife and habitat, e.g. adhere to seasonal closures**
4. **educate co-workers, suppliers and clients on regulations, policies and best practices, e.g. post clear rules and requirements**
5. **manage interactions with wildlife, for example:**
    - do not habituate wildlife, e.g. do not feed
    - maintain respectful and safe distance
    - do not disrupt natural behaviours, e.g. do not follow animal, do not use drones
    - respect wildlife corridors
    - eliminate wildlife attractants from property
    - avoid visiting during critical seasons, e.g. nesting, breeding, spawning
    - keep domestic animals leashed
6. **manage interactions with captive animals, e.g. in zoos and aquariums, for example:**
    - ensure that care personnel are licensed and have appropriate qualifications
    - inspect animals' health and housing conditions regularly
    - minimize interactions between captive and non-captive animals
7. **practice responsible hunting, fishing and foraging, if applicable:**
    - follow regulations, e.g. limits, size, catch and release
    - promote selective harvesting
8. **preserve habitat, for example:**
    - stay on designated paths
    - avoid contamination or introduction of invasive species and diseases:
        - clean gear, watercrafts and vehicles in designated areas

- protect fragile habitat when clearing land for development, when possible
- consider carrying capacity of area, e.g. limit number of clients, coordinate activities with other users

9. **follow responsible fire practices, e.g. Fire Smart Canada, for example:**
    - promote awareness
    - follow regulations and policies
    - allow fires only in designated areas
    - report uncontrolled fires immediately
10. **leave what is found in place, for example:**
    - leave rocks, plants and other natural objects as found
    - do not introduce or transport non-native species
    - do not adapt natural areas, e.g. do not build structures or dig trenches
11. **participate in restoration activities, for example:**
    - remove foreign objects and garbage
    - participate in community initiatives, e.g. tree planting, trail maintenance
12. **recommend changes to sustainability management plan, as required**

Knowledge

1. **ecologically sensitive areas, e.g. nesting and spawning areas, fragile plants**
2. **environmentally sustainable practices and approaches, e.g. tourism sustainability standards, responsible harvesting and hunting practices**
3. **local experts, e.g. biologist**
4. **organization's sustainability management plan**
5. **potential environmental impact of activities**
6. **principles of minimum impact tourism**
7. **relevant legislation and regulations, e.g. wildlife harvesting and trade**
8. **relevant policies and procedures, e.g. stay within roped boundary**
9. **wildlife behaviours and habitats, e.g. local, endangered and/or vulnerable species, wildlife corridors and migration patterns**

7.2.1 Promote awareness of local culture and history

Purpose

Promoting awareness of local culture and history helps to showcase and recognize their importance and deepen clients' understanding of, and connections with, the area.

Performance and Abilities

1. **engage community members and site personnel:**
   - agree upon best practices and guidelines
2. **comply with best practices, protocols, laws and regulations regarding activities related to local cultural and historic sites, e.g. Indigenous communities, national sites**
3. **educate employees, suppliers and clients about guidelines and requirements**
4. **monitor compliance with guidelines and requirements:**
   - identify unacceptable behaviours
   - take corrective action
   - document corrective action taken
5. **contribute to protection, preservation and enhancement of historical and cultural sites, for example:**
   - make monetary contributions
   - provide in-kind support
   - respect intellectual property rights and Indigenous traditional knowledge of local communities
6. **incorporate culture and heritage of local area into operations, for example:**
   - prepare resources and materials in collaboration with Indigenous community members
   - use local arts and crafts in design and furnishings
   - represent heritage and traditions in cuisine, retail spaces and events
7. **protect artefacts:**
   - report use of artefacts in activities
   - prevent removal or damage of artefacts

Knowledge

1. best practices for cultural and historic preservation
2. conflict resolution techniques
3. culturally respectful behaviours, e.g. obtain permissions
4. Indigenous communities in area
5. Indigenous traditional knowledge, rights and protocols
6. intellectual property rights
7. natural and cultural heritage of area
8. relevant legislation and regulations, e.g. pertaining to historical and cultural sites and use of artefacts
9. sources of local arts and crafts

8.1.1 Use communication applications

Purpose

Communication and collaboration applications serve as cost-effective and time-efficient means for information exchange and document sharing. Audiovisual communication applications (especially those with document-sharing capabilities) help to facilitate meetings, training and increased collaboration among users, regardless of users' locations.

Performance and Abilities

1. **select recipients who need to respond to information in message:**
    - copy message to individuals who need to be aware of information
2. **choose application (e.g. email) appropriate to situation:**
    - consider complexity, urgency, sensitivity and confidentiality of message
3. **follow organization's protocols, e.g. required salutation, sign-off or disclaimer**
4. **use email:**
    - use subject line:
        - enter concise subject matter heading to message
        - leave existing subject matter heading if it accurately reflects topic of communication
    - use appropriate format for attachments, e.g. PDF, Word
    - organize mailboxes to improve efficiency, for example:
        - use settings to redirect mail to specific folders, e.g. junk mail, personalized mailboxes
        - flag messages if action is required
        - file messages and attachments in archive/hard or cloud drive
5. **use text messaging:**
    - keep message brief
    - do not use texting abbreviations, e.g. lol, btw
    - do not use emojis or attachments, e.g. animated GIFs
6. **use collaborative applications:**
    - send invitations of virtual meetings to participants
    - use document program features to:
        - edit on screen in real time
        - share control of screen
        - communicate with other participants
    - coordinate with conference calling or Voice Over Internet Protocol (VOIP) services to speak to virtual meeting members

- use online document-hosting sites to share documents:
  - upload and download documents to make changes
  - follow file naming procedures to control versions, e.g. dates, initials, numbering sequence
- ensure appropriate conditions for using collaborative applications, for example:
  - ensure computer screen background display is appropriate
  - ensure quiet background when using audio

Knowledge

1. audience needs and expectations
2. business writing guidelines
3. organization's approved communication and collaborative applications
4. protocols for system and applications
5. purpose of communication
6. relevant policies and procedures, e.g. computer and software use, filing of information, cybersecurity

8.1.2 Use common software applications

Purpose

Computer software applications help to increase the productivity and efficiency of practitioners and enhance service to clients.

Performance and Abilities

1. **select appropriate application for activity, e.g. writing report, taking photograph or video, creating presentation, inputting data into spreadsheet, organizing digital storage**
2. **when working with word processing and spreadsheet applications:**
    - set up document to maximize efficiency, e.g. use customized templates from other projects, standardize formatting
    - save document upon opening and regularly afterwards to decrease chances of lost work
    - use program icons and functions on toolbar/ribbon, for example:
        - edit content appearance
        - perform mathematical functions
        - present numerical data in graphical representation
3. **when working with photographs or videos:**
    - identify situations when photograph or video is more effective than text, e.g. send photograph of broken item to maintenance
    - select method to capture images best suited for end use, e.g. panorama, video
    - check image/video to ensure it is clear or to desired quality
    - use program icons to download, share, edit or delete photographs
4. **when creating presentations:**
    - select slide theme, colours and format to present cohesive presentation
    - create slides as speaking points or as visual representations of discussion points
    - minimize amount of text
    - ensure slides are legible when projected, e.g. font size, colour
    - insert organization's branding images, as required
5. **save documents and photographs to hard, shared or cloud drive or in appropriate folder, e.g. images in photo storage application:**
    - name file according to file-naming procedures
6. **share data (e.g. import, export) with applications, as necessary**

Knowledge

1. access controls and restrictions, e.g. usernames, passwords
2. application toolbar/ribbon icons and functions, e.g. bold, font, formatting, text wrapping, formulas
3. available software applications
4. file naming procedures
5. purposes and features of software applications
6. relevant policies and procedures, e.g. computer use, mobile devices, cybersecurity

8.1.3 Use navigation and mapping applications

Purpose

Navigational and mapping applications are used to support safe and efficient travel from one location to another. Correct use of these applications is important to protect the safety of clients and co-workers.

Performance and Abilities

1. **use global positioning system (GPS)-enabled device required for task**
2. **initialize device, if required:**
   - follow manufacturer's instructions, e.g. connect to computer
   - enable settings, e.g. download updated maps, test functions
3. **prepare GPS-enabled device for trip:**
   - stand in open area, rather than in buildings or near tall structures
   - allow GPS to pinpoint location, i.e. for satellites to lock onto receiver
   - input starting location and destination, using coordinates if addresses are not available
4. **decide on route, considering relevant factors, e.g. toll free, clients' abilities, terrain**
5. **check device:**
   - test batteries:
     - carry extra set of batteries or battery pack
     - protect batteries from extreme temperatures
   - check memory:
     - change memory card, if necessary
     - take additional card if more space is required
   - check that magnetic compass is working
6. **take compass and hard copy of maps as backup if going into rural or backcountry areas**
7. **provide address or coordinates of destination and trip route to dispatch/home base**
8. **set GPS system to take waypoint coordinates along trip route, especially if off-road**
9. **follow trip routing to go on to next waypoint or return to starting point**
10. **comply with use of GPS features in vehicles or on personal locator beacon**
11. **download trip details when trip is completed, if required**

Knowledge

1. capabilities, limitations, restrictions and use of navigation system, mapping applications and GPS-enabled devices
2. compass use
3. geographical coordinates
4. relevant legislation and regulations
5. relevant policies and procedures, e.g. client safety, reporting, GPS use, vehicle tracking
6. types of maps and how to interpret them

8.1.4 Enter and retrieve data

Purpose

It is essential to an organization's productivity and security that information entered and retrieved is organized, accurate, secure and being used as required.

Performance and Abilities

1. **follow organization's requirements to log in to and log out of applications and computer system:**
    - comply with assigned level of access to data, e.g. use only authorized account
2. **follow organization's ICT protocols when creating, transferring, requesting or receiving data-based information, for example:**
    - cybersecurity, e.g. log in, log out, uploading from external sites
    - approved common and proprietary applications, purposes and uses
    - use of personal devices to access organization's system
    - confidentiality and privacy
    - file-naming procedures
    - organization of shared drives
    - printing protocols, e.g. shared printers, access codes
    - file-sharing protocols between organization's users
3. **follow policies and procedures:**
    - when entering data:
        - record data by:
            - scanning with electronic scanner using bar codes, e.g. Universal Product Codes (UPC), employee codes
            - entering manually
        - check accuracy of data entry:
            - attempt to correct input errors prior to contacting ICT specialist
    - when retrieving data:
        - locate required files or databases on computer drives or on organization's shared drives:
            - use appropriate search terms (e.g. file name, subject matter, client name) to find information
        - prevent unintended changes or misconfiguration of data:
            - do not edit or change data without permissions
        - follow affiliated network's policies and procedures when accessing information from approved affiliated networks, e.g. central reservation system, rewards programs
4. **use save function frequently to prevent data loss:**
    - follow required procedures for naming files
    - save in appropriate drives

5. upload approved files to external sources (e.g. payroll, accounting, inventory), if required
6. work with organization's ICT specialists when, for example:
   - data requirements change
   - new equipment or new operating software is introduced
   - data collection equipment and software applications are not functioning correctly

Knowledge

1. access permissions and restrictions
2. importance of accurate data
3. indicators of potential malware attacks
4. indicators of system malfunction
5. organization's ICT protocols
6. personal password
7. relevant policies and procedures, e.g. computer and system use, shared devices, information sharing

8.1.5 Conduct online research

Purpose

It is important for a practitioner to conduct online research using sources that are credible and factually correct. Depending on the information required, research may be current or future-oriented, with diversified or common viewpoints. In any case, incorrect or dated information can negatively impact decisions made, which can frustrate clients and affect an organization's integrity.

Performance and Abilities

1. **determine online research strategy:**
   - identify tools (e.g. search engines, websites/databases of proprietary research) appropriate for different search purposes, e.g. direction, recommendations, market analysis
   - define keywords, phrases and questions
   - balance research between depth required and time allotted
2. **enter search terms, e.g. use relevant and specific words and phrases**
3. **identify credible sources:**
   - evaluate each source of information continuously:
     - use selection criteria, e.g. dates of publication, types of sources, potential biases, credentials of publisher, other cited sources
   - create folders or bookmarks to save links, if applicable
4. **review content of sources:**
   - assess relevancy to topic
   - determine level of detail appropriate for purpose
   - validate content accuracy, for example:
     - compare similarities and differences of sources, e.g. common information, facts and viewpoints
5. **identify additional potential resources as needed, for example:**
   - use links in initial research to connect to other sources
   - check resources listed in bibliographies of other sources
   - widen or narrow scope of search, e.g. use different search terms
6. **summarize research findings:**
   - make notes on content that match needs of research:
     - identify source of notes, including information required for selected format of citation
     - note specific location of direct quotes to be used
7. **follow copyright laws and ethics:**
   - do not plagiarize others' ideas or writing, e.g. use own words to describe findings, acknowledge excerpts from source
   - determine requirements for copyright permission
   - cite sources

Knowledge

1. copyright legislation, e.g. protection of intellectual property
2. cybersecurity risks
3. different tools, e.g. browsers
4. potential biases of different sources, e.g. equipment vendor article, academic research paper, blog article
5. purpose and scope of research
6. relevant policies and procedures, e.g. computer use, seeking copyright permission, permissions required to sign up and access specific sources
7. required citation format
8. types of search sources

8.1.6 Follow cybersecurity procedures

Purpose

It is essential for practitioners to follow cybersecurity procedures in order to reduce the risk of security breaches. These breaches can put an organization's, its vendors' and clients' private information in jeopardy, potentially harming the organization's business and reputation.

Performance and Abilities

1. **use equipment/software applications approved by organization**
2. **follow system log-in/log-out procedures, for example:**
    - log out of system when work is completed or equipment is unattended
    - use passwords:
        - change passwords when requested or as required by organization's information and communication technology (ICT) procedures
        - use mix of symbols, letters and numbers to ensure password strength
        - do not share passwords with others or store them where easily accessible
3. **comply with assigned permissions and access limits**
4. **do not:**
    - work using unsecured internet connections or on public computers
    - leave digital equipment (e.g. cellular telephone, tablet, flash drives) unattended
    - plug unauthorized flash drives or cellular telephones into devices
    - alter or disable security programs on organization's system
5. **update security as directed**
6. **carry out work on web in secure manner, for example:**
    - use secure web browsers and search engines, for example:
        - check universal resource locator (URL) for https://; s indicates secure connection
        - examine for spelling errors, sometimes minor, that may indicate fraudulent websites
    - avoid using links, when possible, even in secure websites
    - follow procedures for allowing/removing cookies and history
7. **use communication applications in secure manner, for example:**
    - use approved communication channels and procedures, especially when communicating or exchanging information with other organizations
    - verify authenticity of unknown senders before opening suspicious mail or attachments, e.g. check email address domain, provide ICT specialist with captured screenshot of email
    - do not provide sensitive work information to unknown email sources or callers:
        - requests for information could be attempts at phishing or social engineering
    - do not post work information on personal social networks without authorization

8. back up files as directed
9. contact ICT specialists immediately if:
   - troubleshooting attempts fail
   - computer or device is unresponsive or is operating in unusual manner, e.g. frequent information or data disruptions, misconfigurations, gaps or unexplained changes
   - system or software opens with unusual messages, demands or instructions

Knowledge

1. access permissions and restrictions, e.g. personal password
2. approved applications
3. approved communication channels
4. importance of keeping private information secure and confidential
5. indicators of poor computer performance, data corruption and potential risks to system, e.g. viruses, malware, ransomware
6. indicators of unsecured or fraudulent websites
7. relevant policies, protocols and procedures
8. roles and responsibilities of internal/external ICT services
9. secure internet connections, web browsers and search engines

8.1.7 Troubleshoot issues with applications and computers

Purpose

Troubleshooting minor issues with computers and software applications increases productivity and reduces the costs associated with information and communication technology (ICT) specialists. It is important, however, to recognize when an issue is beyond one's expertise and requires the attention of a specialist.

Performance and Abilities

1. **identify nature of issue, e.g. hardware, software, power supply, regional problem:**
   - check system status
2. **use basic troubleshooting techniques:**
   - check power supply and internet connection, e.g. cable connection, surge protection, battery status
   - restart devices
3. **act within limits and expertise if issue continues, for example:**
   - run antivirus application
   - update drivers
   - check online for other solutions
4. **seek assistance from ICT specialists if issue persists**

Knowledge

1. backup power supply
2. importance of acting within limits and expertise
3. indicators of poor computer performance
4. peripherals and connections
5. relevant policies and procedures
6. software applications, hardware use and operating systems

9.1.1 Implement risk management plans

Purpose

Implementing the risk management plan is critical in order to minimize potential losses and liability to people, assets and the future earning power of an event, project or organization.

Performance and Abilities

1. **communicate risk management plan and procedures to relevant individuals**
2. **conduct test scenarios, as required:**
    - adjust plan, if needed
3. **execute strategies outlined in risk management plan, e.g. establish emergency response team, hire security, obtain financing**
4. **report incidents and potential indicators of risk to appropriate personnel (e.g. manager) as they occur:**
    - escalate issues that must be addressed immediately, e.g. involve others needed to address potential risk
5. **implement relevant contingency plan when necessary**
6. **monitor effectiveness of risk management plan, including:**
    - collect information on how risks are handled
    - evaluate responses to risk
    - monitor use of resources allocated to risk management
7. **inform key personnel of effectiveness of strategies**
8. **evaluate changes needed:**
    - identify areas for improvement
    - make suggestions for revisions
9. **circulate documentation for feedback:**
    - adjust plan based on feedback
10. **file documentation**
11. **update document, e.g. as scheduled, annually**

Knowledge

1. **importance of risk management, i.e. consequences of not managing risk**
2. **organization's risk appetite**
3. **organization's risk management and contingency plans, including roles and responsibilities**
4. **relevant legislation and regulations, e.g. fire, liability, public heath, environmental protection**
5. **relevant organizational structure and capabilities**
6. **relevant policies and procedures, e.g. event plan**

9.1.2 Implement contingency plans

Purpose

Implementing contingency plans increases the chances that, when encountering abnormal conditions or emergencies, loss and liability will be limited. Required actions are known and can be taken immediately, helping to ensure that an organization will continue to operate, or an event or project can progress, with minimal impact.

Performance and Abilities

1. **communicate contingency plans and procedures to relevant individuals**
2. **report incidents and indicators of risk to appropriate personnel, e.g. manager**
3. **follow procedures outlined in contingency plan, including:**
    - decision making framework
    - communication protocols, e.g. inform clients, provide updates to other departments
    - business continuity procedures
    - media protocols, e.g. refer to media spokesperson
4. **perform post-incident evaluation of contingency plan, including:**
    - collect information on effectiveness
    - identify areas for improvement
    - make suggestions for revisions, e.g. inform key personnel
5. **circulate documentation for feedback:**
    - adjust plan based on feedback
6. **file documentation**
7. **update document, e.g. as scheduled, annually**

Knowledge

1. **importance of risk management, i.e. consequences of not managing risk**
2. **organization's contingency plan, including roles and responsibilities**
3. **organization's risk appetite**
4. **relevant authorities, agencies and governing bodies that preside over specific activities, e.g. emergency response**
5. **relevant legislation and regulations, e.g. fire, liability, public health, environmental protection, protection of privacy**
6. **relevant organizational structure and capabilities**
7. **relevant policies and procedures, e.g. event plan**

10.1.1 Conduct research

Purpose

Thoughtful and purposeful research helps to ensure the development of interpretive experiences that meet both organizational and participant needs.

Performance and Abilities

1. **determine theme/concept for interpretive experience:**
   - review organizational concept, vision and goals
   - identify desired outcomes, e.g. what participants should take away from experience/interaction
2. **familiarize self with site/resources, for example:**
   - phenomena that can be experienced by participants, e.g. mountains, forest
   - site infrastructure, e.g. buildings, resources, technology
3. **identify target audience for interactive experience, e.g. age, education, gender, personal experiences**
4. **conduct secondary research to inform interpretive experience, for example:**
   - review previous interpretive experiences on similar theme/concept
   - search online media, publications and government departments
   - scan existing documentation and resources, e.g. pamphlets, brochures
5. **conduct primary research to inform interpretive experience, for example:**
   - interview subject matter experts, e.g. elders, cultural advisors, site guides, staff
   - experience subject or resource, e.g. walk trails, hike routes, hold artifacts
   - visit organizations, e.g. libraries, archives, museums, chambers of commerce
6. **assess collected research:**
   - connect relevant findings to theme/concept for interpretive experience

Knowledge

1. curriculum, where applicable
2. information sources
3. interpretive principles and models, e.g. Tilden's Six Principles, Sam Ham's TORE model, Beck & Cable's Fifteen Principles, Falk and Dierking's Contextual Model of Learning
4. interpretive program requirements
5. personal and nonpersonal interpretation, e.g. definitions, benefits
6. related issues and trends
7. relevant legislation and regulations
8. relevant policies and procedures
9. research techniques
10. target audience, e.g. demographics, interests
11. types of participant engagements, e.g. physical, social, intellectual, emotional
12. use of interpretive tools

10.2.1 Engage participants

Purpose

Engaging participants helps to create a credible and more meaningful experience that can enhance participants' visit. Effective engagement helps participants connect with the leader and the site, creating memories and appreciation.

Performance and Abilities

1. **create safe and welcoming environment for participants, for example:**
   - greet participants
   - introduce self
   - use open body language
   - use appropriate humour
   - ask opening questions, e.g. "Where are you from?", "What drew you to this site?"
2. **identify participants' needs for accommodation, e.g. hearing or visual aids, reduced sensory experience, mobility assistance:**
   - provide accommodation, if possible
3. **provide support, direction and information needed for participants to fully engage in experience:**
   - outline itinerary
   - explain health and safety protocols
4. **demonstrate knowledge of subject and site, e.g. be prepared for questions**
5. **listen actively**
6. **answer participant questions with interest and enthusiasm**
7. **encourage participants to make personal connections with site/resources**

Knowledge

1. **active listening techniques**
2. **available accommodations, e.g. headsets, wheelchairs**
3. **communication techniques**
4. **interpretive principles and models, e.g. Tilden's Six Principles, Sam Ham's TORE model, Beck & Cable's Fifteen Principles, Falk and Dierking's Contextual Model of Learning**
5. **open body language**
6. **relevant legislation and regulations**
7. **relevant policies and procedures**
8. **subject matter, e.g. local history, fauna, flora**

10.2.2 Use interpretive techniques

Purpose

Using interpretive techniques well enhances understanding, and fosters intellectual and emotional connections, between participants and the interpretative experience. This can also increase participants' enjoyment.

Performance and Abilities

1. **ensure interpretive tools/supports are in working order and available for use, if applicable, e.g. headsets working, videos ready, props/artefacts in correct locations**
2. **follow interpretive plan, if applicable**
3. **incorporate various interpretive techniques into experience, for example:**
    - living history, animation and characterization
    - demonstration
    - interactive participation, e.g. games, role-playing
    - storytelling
    - visualizing
4. **modify interpretation based on group dynamics, e.g. different learning styles, cultures, genders, ethnicities, interests and age groups:**
    - personalize interpretive content to match interests of groups, if applicable
    - modify tone of voice, pace of speech and body language
    - personalize delivery, e.g. display relevant emotion, enthusiasm or reverence
5. **verify engagement of participants, for example:**
    - observe affirming body language, e.g. eye contact, nodding, open body language
6. **modify techniques, if required, e.g. ask for feedback, personally interact, ask question of participant**

Knowledge

1. **interpretive principles and models, e.g. Tilden's Six Principles, Sam Ham's TORE model, Beck & Cable's Fifteen Principles, Falk and Dierking's Contextual Model of Learning**
2. **personal and nonpersonal interpretation, e.g. definitions, benefits**
3. **relevant legislation and regulations**
4. **relevant policies and procedures**
5. **role of interpretation within organization**
6. **subject matter, e.g. local history, fauna, flora**
7. **various types of interpretive techniques**

10.2.3 Manage interpretive experiences

Purpose

Managing interpretive experiences properly can help to ensure that participants have positive, meaningful, safe and enjoyable outcomes as a result of the interaction.

Performance and Abilities

1. **manage group, for example:**
   - keep group together, e.g. when on walking tours
   - verify number of participants, e.g. prior to moving from one location to another
   - allow for breaks and rest periods
2. **respond to health and safety issues, e.g. participant injury, impending storm:**
   - follow organizational policies and procedures for emergency response
   - ensure health and well-being of participants, e.g. provide shelter, offer support until emergency services arrive
3. **field questions on controversial or difficult topics:**
   - respect participants and questions
   - listen actively
   - maintain professionalism, e.g. remain calm, avoid becoming angry
   - respond with diplomacy and tact:
     - communicate facts, not opinions
     - encourage respect among participants
4. **manage inappropriate participant behaviours, e.g. showing disrespect for others, misusing resources or artifacts, not following health and safety regulations:**
   - address inappropriate behaviour with participant directly, e.g. politely ask person to refrain from negative comments, reinforce rules and guidelines
   - speak with participant in private if behaviour continues, e.g. remove from group and discuss issue
   - remove participant from experience if behaviour continues:
     - seek support from management personnel, if required
5. **gather feedback during and after delivery from participants, e.g. ask questions, collect comment cards, direct to surveys**
6. **gather feedback after delivery from team members, e.g. have co-worker observe delivery, discuss during team meeting, debrief at end of day**
7. **evaluate own performance:**
   - identify areas of strength and for improvement
8. **modify experience/techniques based on feedback from participants, for example:**
   - use different interpretive techniques to involve participants
   - adapt planned experiences and interpretive media, e.g. change itinerary, redesign print material

Knowledge

1. communication techniques
2. crisis management techniques
3. goals of interpretive program
4. organization's mission statement, mandate, goals, objectives, themes and programs
5. professionalism
6. relevant legislation and regulations
7. relevant policies and procedures, e.g. health and safety, managing participants
8. subject matter, e.g. local history, fauna, flora

11.1.1 Arrange trip details

Purpose

Appropriately arranging trip details for outdoor guided adventures can give clients a quality experience, minimize risks and encourage positive feedback and repeat business.

Performance and Abilities

1. **plan trip details and logistics, for example:**
    - goals, e.g. types of activities, skills to be attained, adventures sought
    - services included, e.g. meals, accommodation
    - itinerary and schedule
    - pre-existing arrangements with suppliers
    - equipment and supplies required, e.g. first aid and survival kits, food
    - food, fuel and equipment cache locations
    - information that has been provided to clients
    - legislation related to location and purpose of trip, e.g. trespassing laws, hunting/angling regulations, permits and licenses
    - required permissions, e.g. permission to hunt on reserve, private land or area covered by grazing lease; park pass when hiking in national park
    - resource users to be considered or notified, e.g. First Nations, local hunters, recreational boaters, residents, landowners
    - known safety risks, e.g. hazardous terrain
    - emergency plan, e.g. reporting procedures, satellite telephone (sat phone) use
    - minimum impact/no-trace practices
    - guide qualifications, e.g. hiking, paddling, first aid certification, avalanche certification
2. **obtain clients' registration information, e.g. client list, ability levels, food allergies or restrictions**
3. **obtain organization's checklists, e.g. required supplies and gear**
4. **attend organization's pre-trip planning meeting:**
    - confirm trip information, for example:
        - locations of resources, e.g. washrooms, emergency equipment, medical facilities, emergency transportation options
        - current potential hazards, e.g. forest fire threat, dangerous wildlife in area
    - consider alternatives, if necessary, e.g. splitting group into experienced hikers and those wanting easier route
5. **detail activities and times:**
    - consider itinerary and schedule
    - set realistic goals considering group size and clients' abilities, e.g. large group may limit optional outings

- estimate time requirements, e.g. consider that some clients may require more time
- incorporate flexibility, e.g. allow time for teachable moments
- detail destinations, accommodations and modes of transportation
- consider possible problems, e.g. crowding, limited access to parking and trails
- determine relevant closures, e.g. because of wildlife hazards, mudslides or avalanche
- formalize itinerary and schedule, e.g. generate timetable with locations and activities

6. **develop contingency plans for possible problems, e.g. overbooked accommodation, missing luggage, illness/injury, overcrowding, no available parking, no access to trails**
7. **prepare to instruct clients on trip-related practices, procedures and skills:**
    - determine what clients need to know
    - plan instruction:
        - gather information, e.g. research variety of sources
        - prioritize information
        - select best method to provide information, e.g. demonstration, verbal instruction
        - be creative, e.g. use photographs to identify wildlife
    - prepare commentary or interpretive program

Knowledge

1. contingency plan options
2. information clients need to know, e.g. safety precautions, technical skills
3. minimum impact/no-trace practices
4. operation of equipment, e.g. stoves, water treatment system, communication devices
5. presentation methods
6. relevant activities, e.g. hiking, climbing, river running
7. relevant legislation and regulations
8. relevant policies and procedures, e.g. use of pack animals, drug and alcohol use
9. research techniques
10. safety risks, e.g. natural hazards, equipment
11. scheduling techniques

11.1.2 Verify client information

Purpose

Verifying client information prior to a trip allows the worker to identify individual characteristics and needs that may require attention. Awareness of these factors can help customize the trip to individual preferences, which can improve client satisfaction, minimize risk and avoid misunderstandings.

Performance and Abilities

1. **review client information on registration forms, for example:**
    - number of clients
    - names
    - ages
    - locations of home, e.g. Toronto, Gulf Islands
    - group members, e.g. family, friends, all female
    - languages spoken
    - medical conditions, prescription medications and physical limitations
    - special dietary requirements, e.g. food allergies
    - experience and ability levels
    - trip expectations and goals, e.g. preferred activities, skills to attain, desired sights to see
2. **confirm clients' abilities and needs, e.g. fitness level, experience, regularity of activity**
3. **ensure clients have required and current documents, e.g. tags, licenses, certifications, passports**

Knowledge

1. **questioning techniques**
2. **relevant legislation and regulations, e.g. licenses required**
3. **trip requirements, e.g. difficulty, terrain, weather, class of river**

11.1.3 Conduct client orientation briefings

Purpose

Orientation briefings familiarize clients with the main features of the trip and provide needed information while creating excitement. They help to set the tone for the experience, establish realistic expectations and encourage a positive, safe adventure.

Performance and Abilities

1. **communicate place of assembly, e.g. camp, park entrance**
2. **use communication system, if necessary, e.g. microphone, sound system**
3. **welcome clients:**
    - convey thanks for booking trip
    - introduce self and others, e.g. other guides, key personnel:
        - explain roles and responsibilities
4. **explain tour activities and schedule, for example:**
    - features, e.g. altitude gained, fish currently biting, excellent skiing conditions
    - timing details, e.g. rest stops, meal times
    - weather forecast
    - possible alternatives to itinerary, e.g. caused by road or trail closures, wildlife or high water levels
5. **distribute support materials, e.g. itinerary, site maps, information sheets**
6. **ensure informed consent documentation (e.g. acknowledgement of consent, voluntary assumption of risk) has been completed by clients**
7. **outline organization's guidelines, for example:**
    - relevant policies and procedures
    - relevant legislation
    - responsible tourism guidelines
    - gratuity policy
8. **describe safety protocols, for example:**
    - possible dangers, e.g. wildlife, site hazards
    - group management protocols, e.g. stay with group during tour activities, notify group leader of intended whereabouts if leaving group, what to do if leader or client is injured or separated from group
    - guidelines on activity safety
    - emergency procedures, e.g. location of first aid and survival kits
    - health and safety protocols, e.g. sanitation, water purification, hand washing

9. distribute activity equipment, e.g. personal flotation devices (PFDs), climbing harnesses, snowshoes:
   - check that sizes are correct for clients
   - demonstrate use
   - ensure clients understand proper use
10. assess adequacy of clients' personal equipment, e.g. size of backpacks, amount of clothing
11. confirm clients' experience and levels of physical ability
12. allow sufficient time and opportunity for questions

Knowledge

1. area hazards
2. operation of communication systems and devices, e.g. sound system
3. relevant legislation and regulations, e.g. licences and permits required, duty of care
4. relevant policies and procedures, e.g. decisions to be made by leader, catch and release guidelines when fishing
5. responsible tourism guidelines, e.g. staying on paths, not picking flowers, not removing stones or coral
6. safety protocols

11.1.4 Prepare equipment

Purpose

Properly preparing equipment before the trip helps to ensure that it is operational, and reduces risks of malfunctions and mishaps that could decrease client safety and satisfaction.

Performance and Abilities

1. **check group equipment (e.g. boats, kitchen supplies) and equipment to be loaned to clients for personal use (e.g. camping gear, fishing tackle) prior to trip:**
    - confirm availability of items required, e.g. check against client list
    - ensure items are in appropriate condition, e.g. work properly, meet requirements, meet cleanliness standards
2. **prepare transportation equipment for use, for example:**
    - check that equipment is ready for trip, e.g. fuel tank is full, radio is operational, maintained as required by Transport Canada
    - ensure carrying capacity will not be exceeded
    - replenish onboard supplies
3. **check emergency communication equipment, e.g. ensure full charge, locate spare batteries**
4. **verify that first aid kit is well stocked and appropriate for specific clients and activities**
5. **organize personal requirements:**
    - use checklist, for example:
        - basic, e.g. toiletries, clothes
        - specialized, e.g. personal floatation device (PFD), rain gear
        - ensure equipment is in working order
6. **check clients' personal belongings:**
    - ensure items are adequate and appropriate for type of outing and conditions, for example:
        - compare gear to required gear checklist
        - provide missing items, e.g. rain gear
        - ask client to remove and store unneeded items
    - ensure equipment is in working order, e.g. bicycles
    - ensure personal belongings are packed properly for transportation:
        - help client, if necessary
    - ask clients with identified medical conditions for location of personal medication and instructions for use in case of emergency
    - check that clients possess valid paperwork, e.g. licences, passports, tags
7. **pack equipment for transportation, e.g. use waterproof containers, do not exceed recommended weight of horses' saddle bags**

8. be prepared to make repairs on trip:
    - pack repair equipment and supplies

Knowledge

1. equipment inspection, e.g. climbing equipment
2. packing techniques
3. relevant legislation and regulations, e.g. Transport Canada regulations
4. relevant policies and procedures, e.g. inspection and field repair

11.2.1 Provide meals

Purpose

Providing meals properly can result in food that enhances clients' experiences, contributes to overall safety and satisfaction, and encourages repeat business.

Performance and Abilities

1. **acquire food supplies, e.g. from caches or local shops**
2. **set up for meal preparation and/or distribution, for example:**
   - organize cooking area, e.g. food preparation zone, dish cleaning zone, tarps on ground:
     - protect from elements, e.g. use tarps to shelter from rain
   - assign tasks to clients, e.g. collect wood or water, peel vegetables
   - start fire:
     - select safe spot, e.g. not under low-hanging trees
   - set up equipment, e.g. stove
   - protect food from wildlife and spoilage, e.g. keep covered
3. **prepare, or prepare to distribute, meal:**
   - adhere to hygiene and sanitation procedures, e.g. wash hands prior to handling food
   - adapt meal to clientele, e.g. gluten-free biscuits, vegetarian sandwiches
   - follow menu and/or preparation guidelines, e.g. use specified amounts of ingredients
   - follow health and legal guidelines, e.g. use wild meat only if required government permissions have been obtained
4. **serve meal, for example:**
   - be sure plates and utensils are clean
   - create attractive presentation
   - protect clients from burns, e.g. provide potholders
5. **share knowledge of cooking techniques and recipes, if asked**
6. **clean up after meal:**
   - wash dishes promptly, if necessary, to reduce wildlife interest
   - dispose of garbage, wastewater and leftover food appropriately
   - store supplies and equipment properly

Knowledge

1. appropriate food and equipment storage, e.g. bear proof, waterproof
2. appropriate recipes
3. campfire building and safety
4. first aid
5. food allergies and intolerances
6. methods of decreasing environmental impacts, e.g. minimum impact/no-trace practices
7. outdoor cooking methods, e.g. open fire, camp stove
8. packing techniques
9. relevant legislation and regulations, e.g. fire bans, safe food handling
10. relevant policies and procedures, e.g. hygiene and sanitation procedures, proper disposal techniques

11.2.2 Guide trips

Purpose

Guiding trips well can provide clients with an engaging experience that is enjoyable and memorable, can result in a high degree of client satisfaction, and can lead to repeat business and positive word-of-mouth advertising.

Performance and Abilities

1. **evaluate conditions, e.g. geographical, meteorological, environmental:**
   - assess current and forecasted conditions
   - assess risks, e.g. bad weather, wild animals, rough terrain
   - consider effects on planned route
   - adjust accordingly, e.g. activities, route, schedule, equipment, food provisions
2. **follow schedule for activity:**
   - monitor progress
3. **handle transportation needs to, from and during trip, as required, e.g. helicopter, boat, all-terrain vehicle**
4. **ensure clients follow laws, regulations and guidelines, e.g. do not trespass, use minimum impact/no-trace practices, wear personal protective equipment (PPE)**
5. **manage activities, for example:**
   - communicate start and end times
   - provide general safety tips, e.g. safe handholds when navigating rough terrain, avoidance of slippery conditions
   - ensure correct equipment is used, e.g. kayak paddles with kayaks, canoe paddles with canoes, proper type of snowshoes
   - suggest alternate activities, when necessary, e.g. in case of bad weather or injury
6. **respect clients' needs and interests, for example:**
   - consider:
     - clients' mental and physical conditioning
     - skill level required to succeed
     - limitations of equipment
     - emergency preparedness and potential injuries
   - adapt activities to accommodate clients, for example:
     - pair clients to better achieve goals
     - take longer rest breaks when guiding clients with physical limitations
     - travel more slowly over rough terrain
7. **maintain clients' well-being:**
   - keep track of clients, e.g. do not leave clients alone or behind
   - assess levels of engagement, enjoyment and satisfaction as well as signs of difficulty

- keep morale high, for example:
  - focus on positive aspects of trip
  - maintain clients' energy and comfort levels, e.g. help clients stay warm and dry, maintain food and hydration levels
  - encourage clients
- help relieve fears, for example:
  - reassure and calm clients
  - share personal experiences of prior similar circumstances
  - offer options or assistance, e.g. select alternative route, offer supporting hand when client gets into boat
- help clients with medical conditions or physical limitations, for example:
  - take rest stops and supply high-energy foods for fatigue
  - provide shelter and help client warm for hypothermia
  - supply water for dehydration

8. **provide interpretation, for example:**
   - present planned commentary or interpretive program
   - share experiences and knowledge of local culture and area, e.g. history, fauna, flora, legends
9. **use tools (e.g. maps, navigation tools) and knowledge (e.g. orientation and navigation skills) to navigate course and enhance trip, for example, to:**
   - move to optimal location, e.g. locate fish stocks, see wild flowers
   - observe surroundings, e.g. find appealing rest stops, notice changing weather patterns
10. **adjust trip plan, when necessary:**
    - adapt to accommodate disruptions or unforeseen circumstances, e.g. mechanical breakdowns, poor weather, unstable ice pack, herd shifts
    - demonstrate strong decision making and risk management skills
    - use planned contingencies, e.g. closer destination, alternate route
    - inform those affected by changes, e.g. clients, suppliers, tour operator

Knowledge

1. **client competency assessment, e.g. interpretation of body language regarding level of comfort or signs of difficulty**
2. **decision making skills**
3. **expected weather conditions, e.g. prevailing winds, temperature drops at higher altitudes**
4. **first aid training**
5. **navigation skills, e.g. identify routes, slopes and stops; calculate distances and travel times**
6. **relevant geographical territory, conditions and hazards, e.g. types of wildlife, fluctuating water levels**
7. **relevant land use areas and managers, e.g. wildlife management zones, protected areas, Treaty Land Entitlement (TLE)**
8. **relevant legislation and regulations, e.g. Environmental Protection Act, Fisheries Act, safety requirements**
9. **relevant policies and procedures, e.g. avoiding unwanted wildlife encounters, responses to extreme weather**
10. **risk management skills**

11.2.3 Provide skills instruction

Purpose

Providing skills instruction in a safe, organized and clear manner is critical to creating an enjoyable experience for clients, and can protect workers and clients during the activity. Being able to adjust instruction to meet needs can reduce client frustration. Providing skills instruction well can also protect the organization from liability.

Performance and Abilities

1. **assess skills to be taught, considering:**
   - safety issues
   - level of expertise required
   - resources required, e.g. equipment, safety gear
2. **create comfortable and safe learning environment:**
   - choose appropriate location
3. **use appropriate teaching methods, e.g. demonstration, presentation:**
   - use language understood by clients
   - check for understanding, e.g. ask questions
   - organize instruction into sequential steps
   - start with simple and move to complex
4. **explain:**
   - safety concerns
   - types of equipment and techniques used
   - reasons for using equipment and techniques
5. **demonstrate equipment and techniques**
6. **adjust delivery of instruction to individual clients:**
   - use pace appropriate to clients
7. **lead practice session:**
   - allow sufficient time for clients to practice
   - assess clients' comfort levels with skill
   - assess clients' levels of expertise and ability to learn new techniques
   - provide individual feedback, e.g. correct errors, praise client
   - ensure clients can successfully demonstrate equipment use and techniques before beginning activity

8. **provide feedback during activity:**
    - evaluate performance, e.g. determine areas of weakness and inexperience, identify coaching opportunities
    - intervene if safety is compromised
    - recognize success, e.g. praise client, explain what client is doing correctly
9. **debrief activity with clients:**
    - identify successes and areas for improvement, if appropriate

Knowledge

1. area hazards
2. common errors when using activity's equipment
3. expected goals and learning outcomes
4. learning needs of different clients
5. organization's mission statement, goals and objectives
6. relevant policies and procedures
7. requirements of skills to be taught, e.g. safety issues, body mechanics, time required, background knowledge and resources needed
8. safety protocols and guidelines
9. teaching methods and applications, e.g. presentation, global demonstration, kinaesthetic instruction

11.2.4 Manage camp activities

Purpose

A well-managed camp increases the safety and comfort of clients and enhances experiences. Good camp management will also minimize impacts on the environment, allowing for sustainability of the area and therefore use by other visitors.

Performance and Abilities

1. **set up camp:**
    - follow minimum impact/no-trace practices, e.g. camp in sites used previously
    - consider comfort and safety, for example:
        - locate camp in suitable area, for example:
            - on dry, level ground
            - near dry firewood
            - near body of fresh water
        - minimize or avoid potential hazards and dangers, e.g. off animal trails and above high water marks
    - stock provisions in camp, e.g. firewood, water
    - assign tasks to clients, e.g. carry water
    - organize necessary areas, for example:
        - food storage area, e.g. use bear boxes, hang food from trees
        - cooking facilities, e.g. fire pit, dishwashing area
        - shelter, e.g. tents, lean-tos, snow shelters
        - wash area, e.g. shower, handwashing station
        - toilet facilities
2. **maintain camp:**
    - replenish wood and water supplies
    - protect food from wildlife and spoilage
    - preserve integrity of surroundings, for example:
        - keep camp site clean
        - refrain from feeding or attracting animals
        - use only dead or downed wood for fires
        - keep fires small and manageable
3. **protect clients, for example:**
    - ensure clients are comfortable
    - safeguard clients' well-being, e.g. ensure physical ability matches level of effort and skill required in camp activities

- provide required health and safety information
- ensure toilet facilities are adequate and clean

4. **prepare camp for night:**
    - remove remains of food preparation and cleanup
    - store food and equipment safely, e.g. away from wildlife and clients
    - contain or extinguish fire, if required
    - ensure measures (e.g. safety protocols) and equipment needed overnight are in place, e.g. flashlight, headlamps
5. **take down camp:**
    - prepare garbage for packing out
    - extinguish fire, e.g. soak with water or cover with dirt, stir ashes, ensure ashes and pit are cold before leaving
    - dismantle tents and shelters
    - pack equipment in appropriate gear bags and packs
    - store unused firewood in dry area for next visitors
    - inspect site for:
        - cleanliness
        - hot spots from embers
        - forgotten articles

Knowledge

1. **camping and sheltering equipment and techniques**
2. **first aid and safety training, e.g. trail safety, fire safety**
3. **geographical area and hazards**
4. **leadership skills, e.g. emotional well-being of clients, client capabilities**
5. **minimum impact/no-trace practices, e.g. pack in, pack out**
6. **relevant camping guidelines, e.g. wilderness camping, winter camping**
7. **relevant legislation and regulations, e.g. safe food handling**
8. **relevant policies and procedures**
9. **weather forecasting and patterns**
10. **wilderness food preparation**

11.2.5 Prevent negative interactions with animals

Purpose

Avoiding negative interactions with animals can help to prevent injuries and fatalities.

Performance and Abilities

1. **monitor activities of wildlife in area, e.g. watch for signs of bears**
2. **recognize potentially dangerous situations, e.g. elk cows with calves**
3. **take precautions to avoid confrontations:**
    - instruct clients on potential dangers and appropriate responses
    - dispose of garbage properly, e.g. pack garbage out of area
    - store wildlife attractants (e.g. food) safely, for example:
        - away from campsite
        - above ground, e.g. suspend in tree
        - in appropriate containers, e.g. wildlife-proof
    - maintain safe distance from wildlife
    - avoid threatening or cornering animals, e.g. allow route of escape
    - prohibit feeding, baiting and handling of wild animals
4. **respond in event of confrontation, for example:**
    - use knowledge of animal behaviour, e.g. do not run from bears
    - use deterrents, e.g. group together, access bear spray
    - leave area
    - debrief with group

Knowledge

1. **animal behaviours**
2. **appropriate responses to wildlife confrontation**
3. **characteristics of area of travel**
4. **potential wildlife threats, e.g. bears with cubs, seasonal rut, proximity to hibernation sites**
5. **precautions and deterrents**
6. **relevant legislation and regulations**

11.3.1 Construct emergency shelters

Purpose

Constructing a suitable shelter can increase clients' comfort and increase the potential for a safe outcome in an emergency situation.

Performance and Abilities

1. **assess hazards, e.g. wildlife signs, rockslide, rising waters, weather**
2. **assess needs, for example:**
    - number of people needing shelter
    - length of time shelter might be used
3. **assess circumstances, for example:**
    - environmental conditions, e.g. expected weather, exposure to elements
    - time available to build shelter
    - materials available, e.g. tarps, space blankets, snow, hiking poles, rope
4. **determine type of shelter that will offer required protection**
5. **select appropriate location, e.g. dry, flat area; near water; near clearing to signal for help**
6. **build shelter using appropriate method**

Knowledge

1. **characteristics of area of travel**
2. **exposure hazards and mitigation**
3. **relevant policies, procedures and guidelines**
4. **shelters for various conditions and locations, e.g. tarps, shelter dug into snow, tent**
5. **use of equipment in emergencies, e.g. ropes, knife, axe**

11.3.2 Manage food and water in emergencies

Purpose

Managing food and water properly in emergency situations can support clients' well-being and help to maintain calm until resolution of the situation.

Performance and Abilities

1. **locate water source:**
   - collect water in clean container
   - filter or let settle to remove sediment, if required
   - purify water, e.g. boil ten minutes; add required amount of bleach or iodine, or number of halazone tablets
2. **manage food resources:**
   - control amount of food eaten, e.g. consider available supplies, length of time supplies might be required and number of people
   - consume perishable foods first
   - prepare emergency rations (e.g. dehydrated food) according to instructions

Knowledge

1. **characteristics of area of travel**
2. **foodborne diseases, e.g. trichinosis**
3. **signs of food spoilage**
4. **water options, e.g. running water, standing water, rainwater, melted snow and ice**
5. **water purification techniques**

11.3.3 Signal for help

Purpose

Knowing how to effectively signal for help can increase chances of survival and help to maintain clients' well-being.

Performance and Abilities

1. **determine current location, e.g. use global positioning system (GPS), maps or compass**
2. **operate emergency equipment, e.g. cellular telephone, satellite telephone, emergency locator transmitter (ELT), personal locator beacon (PLB):**
   - follow manufacturers' instructions
   - keep transmitter and antenna upright
   - conserve batteries, e.g. keep warm, place on reflective surface
   - transmit signal from high ground, e.g. limit obstructions
   - plan message before transmitting, e.g. group's location, nature of emergency
   - follow required protocols and procedures
   - leave equipment (e.g. ELT, GPS) on until rescued
3. **use international signals for help**
4. **use flares:**
   - follow manufacturer's instructions
   - fire only when aircraft is sighted
   - fire in field of view of aircraft, e.g. slightly ahead
5. **signal using fire and smoke, e.g. build campfire, use smoke signals**
6. **use ground-to-air signals, for example:**
   - find large open area
   - place visual markers, e.g. set up camp, use tarp
7. **send audio signals, for example:**
   - shout
   - use signals in series of three with equal intervals, e.g. whistle three times, fire gun three times, hit dry log with stick three times
8. **continue to signal until rescued**
9. **establish landing zone for rescue helicopter**

Knowledge

1. capacity and response time for rescuing agency
2. contact information for rescuing agency
3. GPS, map and compass reading
4. ground-to-air signalling methods, e.g. strobes, flares
5. international help signals, i.e. three of any type of signal, e.g. three dark tarps secured on white snow, three fires in row, three flares
6. use of communication devices, e.g. cellular or satellite telephone

11.3.4 Handle medical emergencies

Purpose

Handling medical emergencies properly can mean the difference between life and death, and is critical to client safety.

Performance and Abilities

1. **maintain first aid training**
2. **ensure area is controlled prior to handling situation, e.g. consider falling rocks, wild animals or lightning**
3. **establish control of emergency situation, for example:**
    - remain calm
    - lead situation
    - delegate tasks
4. **obtain consent for assessment and treatment of injured person, if possible**
5. **prevent additional harm, for example:**
    - move injured person only if necessary
    - use appropriate personal protective equipment (PPE) to prevent disease transmission
    - determine underlying conditions, e.g. look for medical identification bracelet
6. **provide treatment within scope of training and abilities**
7. **evacuate injured person, if necessary, e.g. call number listed in emergency response plan**
8. **conduct post-incident activities as soon as possible, for example:**
    - take photographs of accident site
    - record details, e.g. time, location, cause, treatment provided, witnesses
    - contact appropriate authorities, e.g. employer, organization’s insurance provider
    - conduct critical incident debrief with clients and other guides
    - determine recommended action to prevent reoccurrence

Knowledge

1. **emergency response plan**
2. **first aid methods and techniques**
3. **known threats, e.g. rough terrain, venomous snakes, poisonous plants, swimming area dangers**
4. **location of nearest medical services**
5. **relevant legislation and regulations**
6. **relevant policies and procedures**

11.4.1 Assist clients with departure

Purpose

Properly assisting clients with departure helps to reinforce relationships, increase overall trip satisfaction and generally contribute to a trip's positive conclusion. In addition, clients' remaining needs can be addressed.

Performance and Abilities

1. **collect loaned gear**
2. **conduct post-trip review, for example:**
   - ask about highlights
   - request feedback, e.g. ask that comment cards be filled out
3. **address concerns:**
   - direct clients to employer for further resolution, when necessary
4. **thank clients personally**
5. **revisit trip highlights**
6. **indicate personal follow-up, if necessary, e.g. email requested information, send skill certificate, forward group pictures**
7. **encourage further business, e.g. endorse other trips, promote organization**
8. **continue to support clients until final departure, e.g. locate transportation, help with luggage, communicate contact information**

Knowledge

1. **clients' needs, e.g. departure flight times, drop-off locations**
2. **contact information, e.g. airport, hotel shuttles**
3. **loaned gear to be collected**
4. **other trips in organization's collection**
5. **techniques to gather, synthesize and communicate feedback to organization**
6. **techniques to obtain useful feedback, e.g. ask open-ended questions**

11.4.2 Participate in organization's post-trip debriefings

Purpose

Post-trip debriefs can contribute to client satisfaction and repeat business, by providing feedback leading to enhancements for future client experiences, and by suggesting possibilities for professional development.

Performance and Abilities

1. **discuss trip with employer, for example:**
   - clients' feedback, e.g. complaints, concerns, compliments
   - supplies left in cache or stockpiled, e.g. equipment, food, wood
   - problems, for example:
     - operational malfunctions
     - damage to equipment, route or camps
     - issues with length and timing
     - challenges with suppliers
     - challenges for clients, e.g. demographic issues, preparedness, diet concerns
   - highlights, observations and impressions, e.g. wildlife sightings, warmer waters
2. **work with employer and colleagues to solve problems**
3. **recommend improvements, e.g. additional equipment, changes to route, different suppliers, changes to pre-trip package**
4. **write descriptive summary report based on organization's requirements, for example:**
   - client reactions
   - accidents and incidents
   - conditions, e.g. weather, trail, route
   - results, e.g. skills taught and mastered
   - action items, e.g. supplier request, equipment replacement, client follow-up

Knowledge

1. **relevant policies and procedures, e.g. organization's feedback systems**

Standards Development Process

Developed by Industry for Industry

From 2018 to 2023, Tourism HR Canada undertook a project to develop a competency framework for the tourism sector in collaboration with industry members, job incumbents, employers, trainers and other stakeholders across Canada. Key phases of development included:

- researching and analyzing existing occupational standards, competency framework charts, education and training programs and job advertisements from national and international sources related to tourism occupations
- benchmarking, including comparing occupational standards with foreign national qualifications and other standards
- creating, reviewing and validating the competencies through industry-wide consultation such as teleconferences, in-person and virtual meetings, online surveys and individual interviews
- conducting research to determine contextual information relevant to each competency, such as range of context and level of practice.

Tourism HR Canada's Competency Framework for Tourism was used to create National Occupational Standards reflective of current and future work demands.

The competencies contained in these National Occupational Standards are drawn from the Competency Framework for Tourism.

Key phases of the development of the National Occupational Standards included:

- researching and analyzing occupation-specific standards, education and training programs, job descriptions and job postings to identify competencies critical for successful performance
- creating occupational charts by selecting competencies from the Competency Framework for Tourism that were identified during the research as being critical for successful performance in the target occupations
- reviewing and validating the occupational charts with industry experts to ensure the list of competencies selected was comprehensive