



RESOURCE LIBRARY - ADMINISTRATION
Hand Over Checklist for General Managers

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NOTE: The “Interview checklists for Department Heads” (C to M) are also an excellent base for handover in the respective departments in case of changes. They could therefore be used as a standard.

A. ITEMS TO ASSEMBLE BEFORE ARRIVAL OF INCOMING GM

	OK	ACTION	DEAD LINE	REMARKS
a) Co-ordinate with Area/Regional Director formal notification to Owing Company about change in GM's, using care to avoid rumours.	_____	_____	_____	_____
b) Review attached checklist items and assemble necessary documents and agreements for review by new GM.	_____	_____	_____	_____
c) Establish realistic timetable and schedule for orderly turnover interviews and reviews of pertinent documents. For example, each morning the new GM could review documents while existing GM conducts normal activities; afternoons being spent for reviewing checklist items, touring hotel and meeting staff; evenings for dinners and receptions to meet Owing Company executives and community leaders.	_____	_____	_____	_____
d) Notify staff at earliest opportunity after Owing Company notification by Area / Regional Director.	_____	_____	_____	_____
e) Arrange schedule for new GM to meet, as appropriate, Owing Company Executives, hotel department heads, hotel staff, community leaders, local travel agents, airline executives and important commercial clients.	_____	_____	_____	_____
f) If bank signatures require power of attorney, arrangements should be made prior to arrival of new GM.	_____	_____	_____	_____
g) Information about country, city and local customs and practices should be forwarded to new GM, if appropriate, prior to arrival (see section B3).	_____	_____	_____	_____
h) Arrange schedule for new GM to tour each hotel department, accompanied by respective department head. Interviews before the tour would normally be held in the GM's office. Departments heads should be prepared to give in-depth briefing on policies and procedures, goals and plans and any rehab plan.	_____	_____	_____	_____
i) Prepare an inventory of GM's apartment and office with Controller / Chief Accountant.	_____	_____	_____	_____
j) Prepare a Management Performance and Development Report for each department head and major supervisor for new GM.	_____	_____	_____	_____

A. ITEMS TO ASSEMBLE BEFORE ARRIVAL OF INCOMING GM

	OK	ACTION	DEAD LINE	REMARKS
k) Settle leaving GM's city ledger account, if appropriate	___	_____	_____	_____
l) Update GM's address book, as appropriate:	___	_____	_____	_____
a) Emergency telephone numbers	___	_____	_____	_____
b) Owning Company contracts	___	_____	_____	_____
c) Hotel lawyers	___	_____	_____	_____
d) Hotel auditors	___	_____	_____	_____
e) Hotel doctors and dentists	___	_____	_____	_____
f) Union representatives	___	_____	_____	_____
g) Government officials and contacts	___	_____	_____	_____
h) Tourism officials and contacts	___	_____	_____	_____
i) Airline managers and contacts	___	_____	_____	_____
j) Chamber of Commerce contacts	___	_____	_____	_____
k) Hoteliers	___	_____	_____	_____
l) Bankers important to the hotel	___	_____	_____	_____
m) Travel agency contacts	___	_____	_____	_____
n) Embassy contacts	___	_____	_____	_____
o) Major hotel purveyors and vendors	___	_____	_____	_____
p) Department head home telephone numbers	___	_____	_____	_____

B. INTERVIEW BETWEEN INCOMING AND OUTGOING GENERAL MANAGER

	OK	ACTION	DEAD LINE	REMARKS
1. Review of Owing Company matters:				
a) Hotel agreement (operating & management, or lease)	_____	_____	_____	_____
b) Owing Company organisation (who's who)	_____	_____	_____	_____
c) Relationship with Owing company	_____	_____	_____	_____
d) Internal Owing Company relationships	_____	_____	_____	_____
e) Names, addresses and telephone numbers of board members	_____	_____	_____	_____
f) Owing Company file (problems, how to handle same)	_____	_____	_____	_____
g) Equity position of owners. Are Board members management employees? Who has approval authority?	_____	_____	_____	_____
h) Capital expense budget procedure with Owing Company	_____	_____	_____	_____
i) Rehabilitation/renovation agreement or plans in progress	_____	_____	_____	_____
j) Board meeting timetable and previous minutes overview	_____	_____	_____	_____
k) Review outstanding or pending Owing Company matters	_____	_____	_____	_____
l) Traditional hotel / Owing Company events and courtesies extended to Board members and Owing Company employees	_____	_____	_____	_____
m) Establish date for presentation of incoming GM to Board	_____	_____	_____	_____

B. INTERVIEW BETWEEN INCOMING AND OUTGOING GENERAL MANAGER

	OK	ACTION	DEAD LINE	REMARKS
p) Complaints and method of handling the same	___	_____	_____	_____
q) Department head meetings (time, format, history)	___	_____	_____	_____
r) Staff Committees:				
1) Budget	___	_____	_____	_____
2) Credit	___	_____	_____	_____
3) Executive	___	_____	_____	Do they meet?
4) Safety/Fire Prevention	___	_____	_____	Are they effective?
5) Security	___	_____	_____	Are minimum requirements met?
6) Sanitation	___	_____	_____	What has been their contribution?
7) Small savings	___	_____	_____	
8) Staff Welfare	___	_____	_____	
s) Departmental training programs under way or planned	___	_____	_____	_____
t) Area- and large purchase orders outstanding	___	_____	_____	_____
u) Who is authorised to sign A&G and A&P checks in the hotel	___	_____	_____	_____
v) Review special festival days, holidays, promotions, history and recommendations	___	_____	_____	_____
w) Insurance coverage review:				
1) Property and fire insurance	___	_____	_____	_____
2) Guest liability (primary and contingent)	___	_____	_____	_____
3) Inventories (as per operating agreement)	___	_____	_____	_____
4) Hotel vehicles	___	_____	_____	_____
5) Insurance handled by Owning Company	___	_____	_____	_____
6) Insurance handled by XYZ HOTELS, Expatriates	___	_____	_____	_____
7) Insurance handled by hotel	___	_____	_____	_____
8) Regular procedure for guest incidents	___	_____	_____	_____
x) Signature authorisation cards for bank accounts	___	_____	_____	_____

B. INTERVIEW BETWEEN INCOMING AND OUTGOING GENERAL MANAGERS

	OK	ACTION	DEAD LINE	REMARKS
y) Review safe combination policy for hotel safe	_____	_____	_____	_____
z) Review policy on GM's keys	_____	_____	_____	_____
aa) Hotel car(s) policy, who can use? Who controls?	_____	_____	_____	_____
bb) General Manager's secretary	_____	_____	_____	_____
cc) Professional / social / fraternal memberships	_____	_____	_____	_____
dd) Safety deposit box at local bank	_____	_____	_____	_____
ee) Business cards, special invitations, compliment cards	_____	_____	_____	_____
ff) GM's city ledger account policy	_____	_____	_____	_____
gg) GM apartment: review rooms to be given back or extra rooms required. Report changes in hotel availability as per policy. Arrange cleaning / hand-over GMs flat and GMs office (hand over date of each to be defined).	_____	_____	_____	_____
hh) Overview minutes of division and area/regional meetings	_____	_____	_____	_____
ii) Known exceptions to XYZ HOTELS guest room minimum standards	_____	_____	_____	_____
jj) Known but not budgeted capital expense items needed	_____	_____	_____	_____
kk) Full inspection report, all areas of hotel	_____	_____	_____	_____
ll) Review and sign off GM apartment and office inventory	_____	_____	_____	_____
mm) Interview with hotel doctor(s) regarding general health of hotel employees and specifically of individual department heads	_____	_____	_____	_____
nn) Labour relations should be discussed by incoming / outgoing GM's and Personnel Manager	_____	_____	_____	_____

B. INTERVIEW BETWEEN INCOMING AND OUTGOING GENERAL MANAGERS

1. Housekeeping & Laundry
2. Recreation & Animation
3. Contracts / Forms
4. Accounting Manual
5. EDP Systems (Electronic Data Processing)
6. Repair & Maintenance
7. Environment
8. Security & Safety
9. Operational Standards
10. Quality Assurance items / Reports
11. Explain navigation and information system within MH&R Intranet / passwords

OK	ACTION	DEAD LINE	REMARKS
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

5. Expatriate Staff: to be discussed with General Manager

- a) Expatriate promises
- b) Transfer possibilities
- c) Contract status
- d) Vacation status
- e) Probable promotions / performance evaluation

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

C. INTERVIEW WITH PERSONNEL MANAGER

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel Manager's background, experience and personal goals	_____	_____	_____	_____
2. Complete personnel listing, including name, position, salary, date and amount of last increase, date of hire, and whether a union (or government) position	_____	_____	_____	_____
3. Read department heads' personnel files	_____	_____	_____	_____
4. Personnel policies:				
a) Hours per week worked, control system	_____	_____	_____	_____
b) Vacation policy	_____	_____	_____	_____
c) National and religious holidays	_____	_____	_____	_____
d) Hiring policy	_____	_____	_____	_____
e) Layoff policy	_____	_____	_____	_____
f) Firing policy	_____	_____	_____	_____
g) Sickness procedure	_____	_____	_____	_____
h) Disability procedure	_____	_____	_____	_____
i) Overtime policy	_____	_____	_____	_____
j) Bonus policy, if applicable (end of year, etc.)	_____	_____	_____	_____
k) Staff transportation	_____	_____	_____	_____
l) Staff housing (live-in, out of house)	_____	_____	_____	_____
m) Who lives in hotel; name(s) / room numbers(s)	_____	_____	_____	_____

C. INTERVIEW WITH PERSONNEL MANAGER

5. Labour laws and regulations:

- a) Minimum wage
- b) Minimum working age
- c) Retirement age: mandatory?
- d) Restrictions on employment
- e) Accident and disability insurance coverage

6. Privileges, entitlements and benefits:

- a) Department head privileges (pool, steward sales, etc.)
- b) Employee privileges (meals, city ledger, etc.)
- c) Union benefits
- d) Medical insurance and related benefits
- e) Cash advances, loans, uniform allowance and the like
- f) Pension or retirement plan or policy
- g) Other benefits

7. Staff welfare:

- a) Committee contribution to staff welfare
- b) Activities and programs
- c) Employee cafeteria and locker areas

	OK	ACTION	DEAD LINE	REMARKS
a) Minimum wage	_____	_____	_____	_____
b) Minimum working age	_____	_____	_____	_____
c) Retirement age: mandatory?	_____	_____	_____	_____
d) Restrictions on employment	_____	_____	_____	_____
e) Accident and disability insurance coverage	_____	_____	_____	_____
a) Department head privileges (pool, steward sales, etc.)	_____	_____	_____	_____
b) Employee privileges (meals, city ledger, etc.)	_____	_____	_____	_____
c) Union benefits	_____	_____	_____	_____
d) Medical insurance and related benefits	_____	_____	_____	_____
e) Cash advances, loans, uniform allowance and the like	_____	_____	_____	_____
f) Pension or retirement plan or policy	_____	_____	_____	_____
g) Other benefits	_____	_____	_____	_____
a) Committee contribution to staff welfare	_____	_____	_____	_____
b) Activities and programs	_____	_____	_____	_____
c) Employee cafeteria and locker areas	_____	_____	_____	_____

C. INTERVIEW WITH PERSONNEL MANAGER

8. Training program

- a) Training facilities (room, library, videos etc.)
- b) Describe training programs by department
- c) Language program
- d) XYZ HOTELS training program, according to training concept
- e) Corporate training program
- f) Government training programs
- g) Supervisory training
- h) First aid training
- i) New hire orientation / Introduction day / godfather system
- j) Fire / safety training
- k) Security training

9. Employee recognition

- a) Employee of the month program or alternative recognition program
- b) Pin awards how often, next date, gift if any, presentation ceremony custom
- c) Complimentary letters, commendations
- d) Suggestion box and means of response; if applicable

	OK	ACTION	DEAD LINE	REMARKS
a) Training facilities (room, library, videos etc.)	_____	_____	_____	_____
b) Describe training programs by department	_____	_____	_____	_____
c) Language program	_____	_____	_____	_____
d) XYZ HOTELS training program, according to training concept	_____	_____	_____	_____
e) Corporate training program	_____	_____	_____	_____
f) Government training programs	_____	_____	_____	_____
g) Supervisory training	_____	_____	_____	_____
h) First aid training	_____	_____	_____	_____
i) New hire orientation / Introduction day / godfather system	_____	_____	_____	_____
j) Fire / safety training	_____	_____	_____	_____
k) Security training	_____	_____	_____	_____
a) Employee of the month program or alternative recognition program	_____	_____	_____	_____
b) Pin awards how often, next date, gift if any, presentation ceremony custom	_____	_____	_____	_____
c) Complimentary letters, commendations	_____	_____	_____	_____
d) Suggestion box and means of response; if applicable	_____	_____	_____	_____

C. INTERVIEW WITH PERSONNEL MANAGER

	OK	ACTION	DEAD LINE	REMARKS
e) Employee newsletter / Information board	_____	_____	_____	_____
f) History of annual outings, parties, etc.	_____	_____	_____	_____
10. Job specifications:				
a) Job descriptions all positions?	_____	_____	_____	_____
b) Describe procedure for filing vacancies	_____	_____	_____	_____
11. Other				
a) Staff turnover and related problems	_____	_____	_____	_____
b) Accident reports and recent trends	_____	_____	_____	_____
c) First aid boxes; location and upkeep	_____	_____	_____	_____
d) Employee entrance control	_____	_____	_____	_____
e) Are there periodic employee locker checks? When are these done?	_____	_____	_____	_____
f) Confidential staff arrangements	_____	_____	_____	_____
g) General problems and concerns	_____	_____	_____	_____
h) Pending Promotions	_____	_____	_____	_____
i) Performance Evaluation System / Yearly Scheduling / Forms to be used	_____	_____	_____	_____

D. INTERVIEW WITH CONTROLLER / CHIEF ACCOUNTANT

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel:				
a) Controller's / Chief Accountant's background, experience and personal goals	_____	_____	_____	_____
b) Technical competence of accounting staff	_____	_____	_____	_____
c) Depth of staff and cross training programs	_____	_____	_____	_____
d) Any concerns?	_____	_____	_____	_____
2. Finance:				
a) Financing arrangements, if applicable	_____	_____	_____	_____
b) Repayment of debt, if applicable	_____	_____	_____	_____
c) Cash flow and cash forecast	_____	_____	_____	_____
d) XYZ HOTELS management fee earnings	_____	_____	_____	_____
3. City ledger / accounts receivable:				
a) Total outstanding and recent trends	_____	_____	_____	_____
b) Number of days in city ledger	_____	_____	_____	_____
c) Magnitude of bad debts and write-offs	_____	_____	_____	_____
d) Overdue accounts and collection procedure	_____	_____	_____	_____
e) Brief description of credit policy	_____	_____	_____	_____

D. INTERVIEW WITH CONTROLLER / CHIEF ACCOUNTANT

	OK	ACTION	DEAD LINE	REMARKS
4. Inventories:				
a) Special problems and control procedures	_____	_____	_____	_____
b) Inventory policy	_____	_____	_____	_____
c) Issuing hours / days of storerooms	_____	_____	_____	_____
d) Steward sales to employees	_____	_____	_____	_____
5. Cash:				
a) Brief description of cash controls	_____	_____	_____	_____
b) Amounts of house banks and individual limits	_____	_____	_____	_____
c) Petty cash and control procedure and limitations	_____	_____	_____	_____
d) Description of banking arrangements and policy	_____	_____	_____	_____
e) Bonded employees and cashier over / short policy	_____	_____	_____	_____
6. Payroll				
a) Brief description of payroll procedures and policy	_____	_____	_____	_____
b) Mechanism for controlling payroll	_____	_____	_____	_____
c) Overtime policy – who can authorise requests	_____	_____	_____	_____
d) Payroll control of department heads (time sheets, etc.)	_____	_____	_____	_____
e) Policy on cash advances to employees and employee loans	_____	_____	_____	_____
f) Brief description of employee benefits	_____	_____	_____	_____

D. INTERVIEW WITH CONTROLLER / CHIEF ACCOUNTANT

	OK	ACTION	DEAD LINE	REMARKS
g) Procedure for casual labour	___	_____	_____	_____
h) Policy on employee city ledger and discounts, if applicable	___	_____	_____	_____
7. Contracts and leases:				
a) Outside contractors for hotel services (window washing, etc.)	___	_____	_____	_____
b) Major hotel contracts	___	_____	_____	_____
c) Shop leases and any problem areas with shops	___	_____	_____	_____
d) Other contracts or leases, including history and status of barter arrangements and any unusual arrangements / charges	___	_____	_____	_____
8. Important policies:				
a) Employee meals in hotel; do employees pay any costs?	___	_____	_____	_____
b) Policy on employee dependent meals	___	_____	_____	_____
c) Policy on A&P checks and A&G checks and procedure	___	_____	_____	_____
d) Check cashing and credit cards	___	_____	_____	_____
e) Policy and control on advance deposits	___	_____	_____	_____
f) Unusual problem areas	___	_____	_____	_____
g) Travel agency commission payments	___	_____	_____	_____
h) Is the number of guest safety deposit boxes adequate? Handling?	___	_____	_____	_____

D. INTERVIEW WITH CONTROLLER / CHIEF ACCOUNTANT

	OK	ACTION	DEAD LINE	REMARKS
9. Reporting:				
a) Any problems with items on administrative calendar	_____	_____	_____	_____
b) Financial statements	_____	_____	_____	_____
c) Preparation of budget and Three-Years Plan	_____	_____	_____	_____
d) Cost control / purchasing / receiving	_____	_____	_____	_____
e) Payroll control	_____	_____	_____	_____
f) Any unusual reporting requirements	_____	_____	_____	_____
g) History and trends in incidents of workmen's compensation cases; guests accidents and claims; thefts	_____	_____	_____	_____
h) XYZ HOTELS / Corporate controls and implementations / follow up	_____	_____	_____	_____
10. Receiving and stores:				
a) Brief description of control points and procedure	_____	_____	_____	_____
b) Special import / customs requirements of restrictions	_____	_____	_____	_____
c) Status update of FF&E budget	_____	_____	_____	_____
d) Inventory controls and bar stock controls	_____	_____	_____	_____
e) Quality control at receiving dock	_____	_____	_____	_____
f) Brief description of storeroom controls, procedures	_____	_____	_____	_____
g) Issuing control for liquor and meat / Good receiving control and storage	_____	_____	_____	_____

E. INTERVIEW WITH ROOMS DIVISION MANAGER / FRONT OFFICE MANAGER

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel:				
a) RDM/FOM's background, experience and personal goals	_____	_____	_____	_____
b) Profile of Assistant Managers	_____	_____	_____	_____
c) Profile of telephone / uniformed service staff	_____	_____	_____	_____
d) Profile of reservation / reception staff	_____	_____	_____	_____
e) Provide list of FO department supervisors / key personnel	_____	_____	_____	_____
2. Daily operation and coverage:				
a) Hours of coverage: RDM / FOM and Assistant FOM	_____	_____	_____	_____
b) Weekend coverage	_____	_____	_____	_____
c) Daily morning briefings	_____	_____	_____	_____
d) Schedule of Rooms Division / Front Office meetings	_____	_____	_____	_____
e) Rooms Division / Front Office training programs	_____	_____	_____	_____
3. Guest relations:				
a) Profile of Guest Relation person	_____	_____	_____	_____
b) Handling of VIP and repeater guests	_____	_____	_____	_____
c) VIP courtesies and approvals	_____	_____	_____	_____
d) Pick-up services to VIP	_____	_____	_____	_____

E. INTERVIEW WITH ROOMS DIVISION MANAGER / FRONT OFFICE MANAGER

	OK	ACTION	DEAD LINE	REMARKS
4. Occupancies, average room rate and yield trends				
a) Forecast last year, compared to actual	_____	_____	_____	_____
b) Forecast this year, compared to actual (YTD)	_____	_____	_____	_____
c) Impact of seasons on hotel (peaks and valleys)	_____	_____	_____	_____
d) General and specific sources of business	_____	_____	_____	_____
e) Provide a listing of major accounts of particular note	_____	_____	_____	_____
f) When are forecasts prepared for department heads? Distribution?	_____	_____	_____	_____
g) Provide a copy of reservations on the books to date for next twelve months	_____	_____	_____	_____
h) List of permanent or semi-permanent guests	_____	_____	_____	_____
5. Facilities and equipment:				
a) General condition of reservations office and reception	_____	_____	_____	_____
b) General state of operating equipment and impact on ongoing operations	_____	_____	_____	_____

F. INTERVIEW WITH EXECUTIVE HOUSEKEEPER

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel and productivity:				
a) Executive Housekeeper's background, experience and personal goals	_____	_____	_____	_____
b) Appraisal of Assistant Housekeepers and various supervisors	_____	_____	_____	_____
c) General calibre of staff	_____	_____	_____	_____
d) Absenteeism / turnover experience	_____	_____	_____	_____
e) Day roommaids – average number of occupied guest rooms/day	_____	_____	_____	_____
f) Night roommaids-average number of occupied guest rooms/night	_____	_____	_____	_____
g) Day floor supervisors – average number of guests assigned/day	_____	_____	_____	_____
h) Hours of various shifts	_____	_____	_____	_____
i) Hours of main linen room	_____	_____	_____	_____
2. Furniture, fixtures and equipment (FF&E) – Guest rooms and public areas	_____	_____	_____	_____
a) Availability of interior designer's furniture arrangement plans and documentation (pictures of furniture, lamps, swathes of fabrics, etc.) where located? Does Executive Housekeeper have ready access to them?	_____	_____	_____	_____
b) Any extras / spares in storage	_____	_____	_____	_____
c) Approximate age of and replacement program status for guest room box springs and mattresses	_____	_____	_____	_____

F. INTERVIEW WITH EXECUTIVE HOUSEKEEPER

	OK	ACTION	DEAD LINE	REMARKS
3. Inventories:				
a) Linen – guest rooms and F&B	_____	_____	_____	_____
1. Status and quality	_____	_____	_____	_____
2. Par stocks in circulation, new in storage, on order but not received	_____	_____	_____	_____
3. Review the more recent inventory recaps	_____	_____	_____	_____
4. Handling of discards	_____	_____	_____	_____
5. Are employee bath towels provided	_____	_____	_____	_____
b) Uniforms	_____	_____	_____	_____
1. Status of quality	_____	_____	_____	_____
2. Sufficient quantity and in good repair	_____	_____	_____	_____
3. Are uniforms fitted by a tailor? Is tailor on hotel staff?	_____	_____	_____	_____
c) Rollaway beds / bed boards / baby cribs	_____	_____	_____	_____
1. Quantity – sufficient?	_____	_____	_____	_____
2. General condition	_____	_____	_____	_____
3. Storage	_____	_____	_____	_____
d) Housekeeping equipment (vacuum cleaners, carpet shampooers, floor scrub / polish machines, roommaid trolleys, etc.)	_____	_____	_____	_____
1. Sufficient quantity	_____	_____	_____	_____
2. General condition	_____	_____	_____	_____
4. Guest rooms supplies:	_____	_____	_____	_____
a) Are all XYZ HOTELS standards provided?	_____	_____	_____	_____
b) VIP special items / give away	_____	_____	_____	_____
c) Floral arrangements / fruit baskets	_____	_____	_____	_____

F. INTERVIEW WITH EXECUTIVE HOUSEKEEPER

	OK	ACTION	DEAD LINE	REMARKS
d) What lamp bulb wattage is used in guest room lamps?	___	_____	_____	_____
e) Who replaces burned out lamp bulbs?	___	_____	_____	_____
5. Keys:				
a) Describe control system used for all keys issued to the Housekeeping Department	___	_____	_____	_____
b) Key policy for supervisors during their absences (leave, vacation, etc.)?	___	_____	_____	_____
6. Lost and found:				
a) Storage, control, security	___	_____	_____	_____
b) Length of time unclaimed items are stored	___	_____	_____	_____
c) Manner of disposal of unclaimed items	___	_____	_____	_____
7. Maintenance work orders:				
a) Is XYZ HOTELS system used?	___	_____	_____	_____
b) Is completion of work orders timely and generally satisfactory?	___	_____	_____	_____
8. Contracts with outside firms for housekeeping services (such as window washing, laundry and dry cleaning, night cleaners, exterminators/pest control, carpet shampooing, etc.):				
a) Does the hotel use any such services?	___	_____	_____	_____
b) If so, do you have copies of contracts?	___	_____	_____	_____
c) Are you satisfied with their services?	___	_____	_____	_____

F. INTERVIEW WITH EXECUTIVE HOUSEKEEPER

	OK	ACTION	DEAD LINE	REMARKS
9. Live-in staff and/or staff housing:				
a) Frequency and extent of housekeeping service provided	_____	_____	_____	_____
10. Occupancy forecasts lists:				
a) Are these received in time for proper planning?	_____	_____	_____	_____
11. Communication systems between main linen room and guest room floors:				
a) Staff telephone with light signal?	_____	_____	_____	_____
b) Beepers?	_____	_____	_____	_____
c) Room status system?	_____	_____	_____	_____
d) Any major problems?	_____	_____	_____	_____
12. In-house transportation system:				
a) Are there soiled linen and rubbish/trash chutes? If so, are they used? If not used, why not? Are they kept locked closed when not being used?	_____	_____	_____	_____
b) Is the practise of walking up one flight of stairs and walking down two flights of stairs (if not carrying bulky items) in lieu of using an elevator, in general effected by all hotel employees?	_____	_____	_____	_____
13. Storage space:				
a) Adequate?	_____	_____	_____	_____
b) If not, what is needed?	_____	_____	_____	_____

F. INTERVIEW WITH EXECUTIVE HOUSEKEEPER

	OK	ACTION	DEAD LINE	REMARKS
14. Training programs and employee meetings:				
a) Discuss	_____	_____	_____	_____
b) Have housekeeping employees been trained regarding what to do in case of fire and how to actually use a fire extinguisher?	_____	_____	_____	_____
c) In general do all hotel employees observe the "No Smoking" areas of the hotel?	_____	_____	_____	_____
15. Inspections:				
a) Describe housekeeping inspection program	_____	_____	_____	_____
b) Review program of General Manager / Executive Housekeeper personal hotel inspection tours, and institute if not already in effect	_____	_____	_____	_____
16. XYZ HOTELS Housekeeping & Laundry Manual:				
a) Is it complete, up to date, and available in Executive Housekeeper's office?	_____	_____	_____	_____
b) Is Executive Housekeeper fully familiar with contents?	_____	_____	_____	_____
17. Annual budget planning and operational goals:				
a) Review Executive Housekeeper's participation in budget planning, especially in the replacement budget for FF&E	_____	_____	_____	_____
b) Review the personal and departmental goals of the Executive Housekeeper	_____	_____	_____	_____

G. INTERVIEW WITH FOOD AND BEVERAGE MANAGER

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel:				
a) F&B Manager's background, experience and personal goals	_____	_____	_____	_____
b) Appraisal of senior F&B supervisors	_____	_____	_____	_____
c) Staffing needs and schedules	_____	_____	_____	_____
d) Employment situation in area:	_____	_____	_____	_____
1. Staff turnover and recruiting	_____	_____	_____	_____
2. Availability and sources of new staff	_____	_____	_____	_____
3. Competitive wage scale and impact on recruiting	_____	_____	_____	_____
4. Transportation: any problems?	_____	_____	_____	_____
5. Method of hiring casual labour (banquets, etc.)	_____	_____	_____	_____
e) Any commitments or promises made (promotions / transfers, etc.) to present F&B staff?	_____	_____	_____	_____
2. Overall operations:				
a) Positive points	_____	_____	_____	_____
b) Negative points	_____	_____	_____	_____
c) F&B payroll cost	_____	_____	_____	_____
d) Food cost / beverage cost	_____	_____	_____	_____
e) F&B improvement priorities	_____	_____	_____	_____
f) Recommendations for new profit centres in F&B	_____	_____	_____	_____
g) Guest questionnaires	_____	_____	_____	_____

G. INTERVIEW WITH FOOD AND BEVERAGE MANAGER

	OK	ACTION	DEAD LINE	REMARKS
h) Latest area F&B reports	_____	_____	_____	_____
i) Operating inventory replacement needs (FF&E)	_____	_____	_____	_____
j) Anticipated F&B rehab programs	_____	_____	_____	_____
k) F&B linen storage, control and history of employee abuse	_____	_____	_____	_____
3. F&B Outlets (recap following for each outlet)				
a) Location	_____	_____	_____	_____
b) Decor	_____	_____	_____	_____
c) Space and seating capacity	_____	_____	_____	_____
d) Hours of operation	_____	_____	_____	_____
e) Review of outlet market:	_____	_____	_____	_____
1. Total market	_____	_____	_____	_____
2. What market segment do we get?	_____	_____	_____	_____
3. XYZ HOTELS's image in this market	_____	_____	_____	_____
4. Special rates and considerations	_____	_____	_____	_____
4. Review of F&B menus and wine lists:				
a) Price structure	_____	_____	_____	_____
b) Competition	_____	_____	_____	_____
c) Review by cost accounting	_____	_____	_____	_____
d) Special menus	_____	_____	_____	_____

G. INTERVIEW WITH FOOD AND BEVERAGE MANAGER

	OK	ACTION	DEAD LINE	REMARKS
e) Printing contracts / procedures	_____	_____	_____	_____
5. Preventive maintenance:				
a) Outstanding repairs	_____	_____	_____	_____
b) Maintenance orders: procedure and effectiveness	_____	_____	_____	_____
c) Special problems?	_____	_____	_____	_____
6. Goals and objectives:				
a) Hotel's and divisional goals and objectives for current year	_____	_____	_____	_____
b) Three-Years Plan goals and objectives	_____	_____	_____	_____
c) What is being done to implement same?	_____	_____	_____	_____
7. Marketing in F&B:				
a) History: what has been tried or considered for each outlet	_____	_____	_____	_____
b) External promotional merchandising programs	_____	_____	_____	_____
c) Internal promotional merchandising programs	_____	_____	_____	_____
d) Advertising programs	_____	_____	_____	_____
e) Public relations programs	_____	_____	_____	_____
f) Competitive trends	_____	_____	_____	_____
g) Marketing Plan	_____	_____	_____	_____

G. INTERVIEW WITH FOOD AND BEVERAGE MANAGER

	OK	ACTION	DEAD LINE	REMARKS
h) Recommendations for merchandising improvements	_____	_____	_____	_____
i) Evaluation of sales organisation for F&B improvements	_____	_____	_____	_____
j) Communication between F&B and Sales, problems	_____	_____	_____	_____
8. Entertainment:				
a) History: what has been tried and what was successful	_____	_____	_____	_____
b) Review existing contracts in summary	_____	_____	_____	_____
c) Effectiveness of present entertainment program	_____	_____	_____	_____
d) Policy on cover charges	_____	_____	_____	_____
9. Banquet Office / Catering:				
a) Banquet / catering menus	_____	_____	_____	_____
b) Banquet / catering promotional material and brochures	_____	_____	_____	_____
c) Current annual banquet / catering forecast	_____	_____	_____	_____
d) Banquet office set up and organisation / catering equipment	_____	_____	_____	_____
e) Banquet sales program	_____	_____	_____	_____
10. Mini-Bars:				
a) Staffing / Organisation	_____	_____	_____	_____
b) Describe controls	_____	_____	_____	_____
c) Merchandising effectiveness in the guest room	_____	_____	_____	_____

G. INTERVIEW WITH FOOD AND BEVERAGE MANAGER

	OK	ACTION	DEAD LINE	REMARKS
d) Any special problems	_____	_____	_____	_____
11. Purchasing for F&B:				
a) Import restrictions which affect F&B	_____	_____	_____	_____
b) Quality and availability of local products	_____	_____	_____	_____
c) Who orders and who approves?	_____	_____	_____	_____
d) Any problems?	_____	_____	_____	_____
12. Receiving of F&B goods:				
a) Quality control at receiving dock	_____	_____	_____	_____
b) Procedure for receiving perishables and frozen goods	_____	_____	_____	_____
13. Employee cafeteria(s):				
a) Policy / involvement of F&B	_____	_____	_____	_____
b) Decor and ambience	_____	_____	_____	_____
c) Food quality control	_____	_____	_____	_____
d) Mechanism for staff suggestions on improvements / menu	_____	_____	_____	_____
e) Entitlement policy for staff / supervisors	_____	_____	_____	_____

H. INTERVIEW WITH EXECUTIVE CHEF

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel:				
a) Executive Chef's background, experiences and personal goals	_____	_____	_____	_____
b) Main kitchen staffing structure	_____	_____	_____	_____
c) Staffing structure other kitchens	_____	_____	_____	_____
d) Profile of major supervisors and technical capabilities	_____	_____	_____	_____
e) Recruiting and other problems	_____	_____	_____	_____
2. Back-of-the-house facilities:				
a) Main kitchen:	_____	_____	_____	_____
1. Condition of equipment	_____	_____	_____	_____
2. Storage and refrigeration	_____	_____	_____	_____
3. Workflow	_____	_____	_____	_____
4. Fire control	_____	_____	_____	_____
5. Recommendations for improvement	_____	_____	_____	_____
b) Other kitchens	_____	_____	_____	_____
c) Stewarding:	_____	_____	_____	_____
1. Staffing structure	_____	_____	_____	_____
2. Location and equipment	_____	_____	_____	_____
3. Cleaning program	_____	_____	_____	_____
4. Pest control	_____	_____	_____	_____
d) Stores:	_____	_____	_____	_____
1. Location	_____	_____	_____	_____
2. Workflow / procedures / control system	_____	_____	_____	_____

H. INTERVIEW WITH EXECUTIVE CHEF

	OK	ACTION	DEAD LINE	REMARKS
e) Food production / quality	_____	_____	_____	_____
f) Heals control / how often / Hygiene	_____	_____	_____	_____
g) Chef's menu planning and menu cycle	_____	_____	_____	_____
h) Staff food cost conscientiousness and program to control	_____	_____	_____	_____
i) Equipment:	_____	_____	_____	_____
1. Status of existing equipment and repair	_____	_____	_____	_____
2. Equipment maintenance	_____	_____	_____	_____
3. Requirement for replacement of equipment	_____	_____	_____	_____

I. INTERVIEW WITH DIRECTOR OF SALES / SALES MANAGER

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel:				
a) DOS / Sales Managers background, experience and personal goals	_____	_____	_____	_____
b) Discuss quality of sales department staff	_____	_____	_____	_____
2. Review current hotel marketing plan in summary:				
a) Analysis of competition (local/domestic/international)	_____	_____	_____	_____
b) Source of business	_____	_____	_____	_____
c) Occupancy trends	_____	_____	_____	_____
d) Room rate trends	_____	_____	_____	_____
e) Top commercial producers	_____	_____	_____	_____
f) Top tour operator	_____	_____	_____	_____
g) Top travel agency producers	_____	_____	_____	_____
h) Top airline producers	_____	_____	_____	_____
i) Marketing strategy / concept	_____	_____	_____	_____
3. XYZ HOTELS Sales program:	_____	_____	_____	_____
a) Recent trends	_____	_____	_____	_____
b) Programs in-house	_____	_____	_____	_____
4. Guaranteed company rate program (A-B-C-rates)				
a) Rate structure	_____	_____	_____	_____

I. INTERVIEW WITH DIRECTOR OF SALES / SALES MANAGER

	OK	ACTION	DEAD LINE	REMARKS
b) Production and effectiveness	_____	_____	_____	_____
5. Sister Hotel program:				
a) Participants	_____	_____	_____	_____
b) Joint promotion	_____	_____	_____	_____
c) Format of program	_____	_____	_____	_____
6. Sales program:				
a) Describe the local/domestic sales program	_____	_____	_____	_____
b) Describe the area/regional sales program	_____	_____	_____	_____
c) Describe the international sales program	_____	_____	_____	_____
d) Sales trips and effectiveness / attended fairs	_____	_____	_____	_____
e) Unusual features of the program	_____	_____	_____	_____
f) Any result orientated bonus program?	_____	_____	_____	_____
g) Staff relations	_____	_____	_____	_____
h) Support regional/area sales	_____	_____	_____	_____
i) Negotiation authority DOS/Sales Manager	_____	_____	_____	_____
7. Guest relations:				
a) Guest history	_____	_____	_____	_____
b) Guest recognition and guest relations staff	_____	_____	_____	_____

I. INTERVIEW WITH DIRECTOR OF SALES / SALES MANAGER

	OK	ACTION	DEAD LINE	REMARKS
c) VIP amenities	_____	_____	_____	_____
d) Welcome cocktail procedures	_____	_____	_____	_____
e) Special programs	_____	_____	_____	_____
f) Guest Newsletter available?	_____	_____	_____	_____
g) Any other information tools?	_____	_____	_____	_____
8. Current advertising plan:				
a) In-house brochure material	_____	_____	_____	_____
b) Production of in-house brochure material	_____	_____	_____	_____
c) Domestic / International media plan	_____	_____	_____	_____
d) Domestic advertising agency / contacts	_____	_____	_____	_____
e) Exposure / Corporate Design, any domestic problems?	_____	_____	_____	_____
f) XYZ HOTELS advertising and promotion	_____	_____	_____	_____

J. INTERVIEW WITH CHIEF ENGINEER

	OK	ACTION	DEAD LINE	REMARKS
1. Personnel:				
a) Chief Engineer's background, experience and personal goals	_____	_____	_____	_____
b) Discuss quality of professional staff	_____	_____	_____	_____
c) Does the Chief Engineer have an effective understudy?	_____	_____	_____	_____
d) Is the staffing adequate?	_____	_____	_____	_____
e) Has outside contracting been studied in lieu of under-utilised or seasonal staffing?	_____	_____	_____	_____
f) Are there any labour problems?	_____	_____	_____	_____
2. Fire / Life / Health / Safety & Security (FLHS&S):				
a) Fire Control				
1. Alarm System:				
a) Who tests and when?	_____	_____	_____	_____
b) Where do alarms ring in the hotel?	_____	_____	_____	_____
c) Is alarm system tied to city fire brigade?	_____	_____	_____	_____
2. Fire warning system and hotel fire brigade:				
a) What systems are available?	_____	_____	_____	_____
b) How often are technical systems checked and when?	_____	_____	_____	_____
c) Does the hotel have an internal fire brigade?	_____	_____	_____	_____
3. Fire procedures:				
a) Arrange details & program for fire drill within 10 days after take over by new GM	_____	_____	_____	_____
b) Describe alert procedure: who calls whom?	_____	_____	_____	_____
c) Describe response procedure	_____	_____	_____	_____
d) Discuss training program and fire drills	_____	_____	_____	_____
e) Are drills conducted with city fire brigade?	_____	_____	_____	_____
f) Hotel emergency procedures printed and properly advertised?	_____	_____	_____	_____

J. INTERVIEW WITH CHIEF ENGINEER

	OK	ACTION	DEAD LINE	REMARKS
b) Bomb threats	___	_____	_____	_____
1. Describe alert and response procedure (Alarm Scheme)	___	_____	_____	_____
2. Discuss history of threats and training program	___	_____	_____	_____
c) Electrical				
1. Review emergency power system (if any)	___	_____	_____	_____
2. What is attached to emergency generator?	___	_____	_____	_____
3. What is history of power outages?	___	_____	_____	_____
4. How is the support/maintenance of the UPS system?	___	_____	_____	_____
d) Water quality				
1. Describe water testing procedures and frequency:				
a) Kitchen (potability and hardness)	___	_____	_____	_____
b) Boiler feed line (hardness only)	___	_____	_____	_____
c) Guest bathroom (potability and hardness)	___	_____	_____	_____
d) Swimming pool	___	_____	_____	_____
2. Any problems with quality, supply or sewage?				
3. Locks and key security:				
a) Who controls keys? How are records kept?	___	_____	_____	_____
b) Who carries master keys, especially emergency and grand masters?	___	_____	_____	_____
c) Are there any missing master keys? Recovery status?	___	_____	_____	_____
d) When are guest room door locks changed? Records kept?	___	_____	_____	_____
e) How many keys per year are being replaced?	___	_____	_____	_____
4. Reporting system:				
a) What reports are being done within POMEK department?	___	_____	_____	_____
b) What reports does Chief Engineer make and which reports does he keep?	___	_____	_____	_____

J. INTERVIEW WITH CHIEF ENGINEER

	OK	ACTION	DEAD LINE	REMARKS
c) How does work order system operate?	_____	_____	_____	_____
d) Review procedures for equipment inventory control	_____	_____	_____	_____
e) Review procedures for equipment maintenance and repair control. Are schedules posted for POMEK staff?	_____	_____	_____	_____
f) What periodic inspections are presently scheduled?	_____	_____	_____	_____
g) Is a system for preventive maintenance in place? Status?	_____	_____	_____	_____
 5. Energy control:				
a) How does POMEK handle energy control and conservation?	_____	_____	_____	_____
b) Is there an energy committee? Is it effective?	_____	_____	_____	_____
 6. Structural:				
a) Are there major problems with physical plant?	_____	_____	_____	_____
b) Are there any civil violations pending or known?	_____	_____	_____	_____
c) Are there any major repairs known but not budgeted/planned?	_____	_____	_____	_____
 7. Other:				
a) What is relationship with Security Department? Are there any security functions handled by POMEK department?	_____	_____	_____	_____
b) Does the Chief Engineer have any concerns?	_____	_____	_____	_____
c) Is there an Environmental Concept available and the action plan in place?	_____	_____	_____	_____
d) How far is POMEK department involved into environmental matters?	_____	_____	_____	_____
e) Is the Chief Engineer a member of the Environmental Committee?	_____	_____	_____	_____

K. INTERVIEW WITH CHIEF OF SECURITY

	OK	ACTION	DEAD LINE	REMARKS
1. Security Chief's background, experience & personal goals	_____	_____	_____	_____
2. General security measures:				
a) Staff deployment on hotel property and watch-clock stations	_____	_____	_____	_____
b) Special security system in hotel (video, metal detectors, walky talky, etc.)	_____	_____	_____	_____
c) MIP guest security (anything unique?)	_____	_____	_____	_____
d) Employee entrance security	_____	_____	_____	_____
e) Timecard security	_____	_____	_____	_____
f) XYZ HOTELS "Minimum Standards" implemented? Deviations?	_____	_____	_____	_____
g) Where are weak points in regards of security?	_____	_____	_____	_____
3. Bomb and terrorist threats:				
a) History of incidents	_____	_____	_____	_____
b) Alert mechanism (alarm scheme)	_____	_____	_____	_____
c) Implementation program following alert	_____	_____	_____	_____
d) Training Program	_____	_____	_____	_____
4. Key security:				
a) Security of master and emergency keys	_____	_____	_____	_____
b) Security of cashier safety deposit box keys	_____	_____	_____	_____
c) Security of storeroom keys	_____	_____	_____	_____

K. INTERVIEW WITH CHIEF OF SECURITY

	OK	ACTION	DEAD LINE	REMARKS
5. Cash security:				
a) Transport of daily deposits to local bank	_____	_____	_____	_____
b) Transport of hotel cashier's banks to / from outlets	_____	_____	_____	_____
c) Burglar and hold-up alarms	_____	_____	_____	_____
d) Special cashier security during power outages	_____	_____	_____	_____
e) Security of safe combinations	_____	_____	_____	_____
6. Prostitute policy:				
a) History of the problem, if any	_____	_____	_____	_____
b) How is the policy handled	_____	_____	_____	_____
c) Co-operation with other hotels and/or local police	_____	_____	_____	_____
7. Guest security:				
a) Policy on changing guest room door locks	_____	_____	_____	_____
b) Missing master keys and recovery program	_____	_____	_____	_____
c) Incidence of guest room thefts	_____	_____	_____	_____
d) Guest safety deposit box security and procedures	_____	_____	_____	_____
8. Death in the hotel:				
a) History	_____	_____	_____	_____
b) Alert notification procedure	_____	_____	_____	_____

K. INTERVIEW WITH CHIEF OF SECURITY

	OK	ACTION	DEAD LINE	REMARKS
c) Information to Embassies/Consulates	_____	_____	_____	_____
d) Special security measures and religious procedures, where applicable	_____	_____	_____	_____
9. Unusual security problems or procedures, if appropriate:				
a) Heads of States	_____	_____	_____	_____
b) Security of bulky valuables (fur coats, etc.)	_____	_____	_____	_____
c) Sexual harassment	_____	_____	_____	_____
d) Other	_____	_____	_____	_____
10. Outside contracts for maintenance:				
a) Major hotel contractors	_____	_____	_____	_____
b) Effectiveness of contractors (elevators, air conditioners, boiler plants, roof, etc.)	_____	_____	_____	_____
c) Any problem areas?	_____	_____	_____	_____

L. INTERVIEW WITH PURCHASING MANAGER

	OK	ACTION	DEAD LINE	REMARKS
1. Purchasing Manager's background, experience and personal goals	_____	_____	_____	_____
2. Purchasing policy, brief description	_____	_____	_____	_____
3. Market visits and purchases of perishables	_____	_____	_____	_____
4. Local spare parts availability	_____	_____	_____	_____
5. Large purchase orders in process and in transit	_____	_____	_____	_____
6. Purchase orders outstanding	_____	_____	_____	_____
7. Procedures for imported items	_____	_____	_____	_____
8. Unusual problems or circumstances	_____	_____	_____	_____

M. RESIDENT MANAGER / EXECUTIVE ASSISTANT MANAGER(S)

OK	ACTION	DEAD LINE	REMARKS
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Due to the wide diversity of job descriptions, job requirements, and the specific training needs and backgrounds for those staff members holding these positions, a specific itemised checklist for these positions should be purposely omitted.

The personal interview should be exactly that: personal, job oriented and career oriented. If appropriate, it may be advisable to extract orientation questions from the General Manager interview and from those departments with which the RM and /or EAM has been involved on an ongoing basis.

General Comments to Handover:

Place, date:	<hr/>	
General Manager leaving the hotel:	<hr/>	Copies to: Head Office Regional Office Handover file GM's Office
General Manager arriving at hotel:	<hr/>	