

## **ESTABLISHMENT INFORMATION CHECKLIST**

This listing of establishment information checklist can be used for trainers/supervisors to identify what information needs to be available to support staff training and the management the operation.

Information to support trainers and supervisors can be found in *Food and Beverage Service 10<sup>th</sup> edition* written by John Cousins and Suzanne Weekes, published by Hodder Education 2020  
*Food and Beverage Management 6<sup>th</sup> edition* written by John Cousins, David Foskett, David Graham, and Amy Hollier, published in 2022 by Goodfellow Publishers

### ***APPRECIATING CUSTOMER NEEDS***

- the range of customers currently using the establishment and their likely needs
- changes that may take place in the customer mix, depending on the day, time of day or season of the year
- changes that may take place in the needs that customers have depending on the day, time of day or season, and changes over time
- a profile of the establishment in terms of the range of services offered

### ***HEALTH, SAFETY AND SECURITY***

#### **Maintaining personal health & hygiene**

- requirement for uniform
- requirements affecting personal grooming
- restrictions on jewellery
- restriction on perfume, after shave and cosmetics
- what legislation applies to personal health and hygiene and where such information can be found from both within the establishment and externally
- what the disciplinary procedure is for staff who do not meet health and hygiene standards
- location of first aid boxes
- procedures to be followed for reporting illnesses and infections
- procedures to be followed in respect of cuts and grazes and other wounds

#### **Maintain a safe environment**

- how inspecting and risk assessment is carried out to ensure safety at all times
- how often inspection and assessment is carried out
- the meaning of safety signage and hazardous substances symbols
- procedures for manual handling
- use of person protective equipment (PPE)
- dealing with aggressive, violent, drunk, ill and drug affected customers
- procedures for responding to terrorism
- establishment procedure for reporting hazards
- how customers are warned of hazards or potential hazards

### **Maintain a secure environment**

- what are considered to be low-risk security areas
- medium-risk security areas
- high-risk security areas
- the reasons for the security designation of areas
- the establishment policy on restricted access areas, suspicious people, or suspicious items
- the procedures used when carrying out an inspection
- the procedure for dealing with lost items

### **Carry out procedures in the event of a fire**

- procedures to be followed in the event of a fire
- location of fire extinguishers, exits and assembly points
- individual responsibilities in the event of a fire

## ***SERVICE AREAS EQUIPMENT AND PRODUCT KNOWLEDGE***

### **Finding your way around the service areas**

- sketch plan of the layout of each of the service areas
- the main purpose of the area
- how the work of the various areas contributes to the service
- roles of the staff within each area
- liaison requirements between the various work areas
- how individuals are intended to liaise with each of the areas
- location of fire and emergency exits, fire extinguishers and access for the disabled if appropriate

### **Using equipment**

- list of all the equipment used:
  - when preparing for service
  - during service
  - when taking payment
  - after service
- individual responsibilities for the care and maintenance of equipment
- requirements for the security of equipment
- location of instruction for use of equipment
- procedures for reporting faults and shortages
- which of the six basic technical skills individuals are required to use in the establishment
- specific requirements of the establishment in the use of these skills
- safety and hygiene practices when using equipment for:
  - housekeeping duties
  - preparation for service
  - during service
  - following service

### **Developing your product knowledge**

- copies of the menus for the establishment
- note of the ingredients, allergens, cooking methods, and service requirements for each item
- copies of the beverage list of the establishment:
- note of the beverage ingredients, allergens, and service requirements of each item
- menu and beverage items which require the individual to seek further information from the customer (e.g. cooking of steaks)
- menu and beverage items which may be offered in alternative ways (e.g. menu items without sauces or drink items with or without ice)
- where there would be extra charges for the provision of these menu or beverage items

## ***DEVELOPING SERVICE SKILLS***

### **Developing Interpersonal Skills**

- policy for greeting customers, addressing customers, attention to customer during their meal and procedure when customers depart
- the importance of being open-minded, non-judgemental and flexible, and able to appreciate and communicate respect for other people's backgrounds, values and beliefs
- teamwork requirements
- most common customer complaints in the establishment:
- procedures for dealing with complaints effectively
- how complaints should be recorded
- how these complaints can be utilised in a positive way
- procedures to be followed in the event of an accident

### **Preparation of Service**

- full range of preparatory duties that are required
- individual specific responsibilities in undertaking these activities
- procedures and systems to be observed when undertaking preparatory tasks
- how these tasks are being assessed to ensure that they meet the requirements of the establishment
- how stock levels of items such as cutlery, glassware, paper, linen etc are determined
- procedure for ordering replacement stock
- range of layouts of the dining areas which may be expected e.g. for special parties

### **Taking bookings**

- bookings routines and procedures
- those times when written confirmation of deposits may need to be taken
- who has the authority to accept or reject bookings
- procedures for dealing with special requests
- procedures for accommodating customers with additional needs
- which areas need to be informed of the booking requirements and how this is carried out

### **Receiving customers**

- procedures and routines for the greeting and receiving of customers
- routines for informing other areas of the customer arrival
- procedures for dealing with special requests
- procedures for dealing with the additional needs of customers

### **Taking food and beverage orders**

- procedures and routines for taking of food and beverage orders
- procedures for dealing with special requests
- procedures for dealing with the additional needs of customers
- methods used to ensure that the customer gets the correct order

### **Serving Food**

- full range of menu items
- service requirements for each menu item
- accompaniments for each item

### **Serving beverages**

- full range of alcoholic and non-alcoholic beverages on offer
- type of licensing provision for the sale of alcoholic liquor
- service requirements for every beverage on offer

### **Clearing**

- cleaning procedures
- range of items which need clearing
- methods for clearing for all items

### **Billing and cashiering**

- how order checks are posted onto the customer bill
- billing method used
- payment methods accepted
- security checks for the various payment methods
- procedures for operating payment points
- revenue control procedures in operation
- security arrangements for cash and equivalents

### **Clearing following service**

- full range of clearing duties that are required
- specific individual responsibilities in undertaking these activities
- procedures and systems to be observed when undertaking clearing tasks
- how these tasks are being assessed to ensure that they meet the requirements of the establishment
- how stock levels of items such as cutlery, glassware, paper, linen etc are determined
- procedure for ordering replacement stock

## ***DEVELOPING SPECIALISED SERVICE SKILLS***

### **Breakfasts**

- service requirement of breakfasts within the establishment

### **Afternoon teas**

- service requirements of afternoon teas within the establishment

### **Room Service**

- service requirements of room service within the establishment

### **Lounge Service**

- service requirements for lounge service within the establishment

### **Guéridon Service**

- service requirements for guéridon service within the establishment
- recipes, methods, and procedures for dishes which are served using the guéridon
- any limitations on the number and range of dishes which can be served at any one time

## ***WORKING IN FUNCTION CATERING***

### **Preparing for and service at functions**

- service requirements of functions within the establishment

### **Contribute to function administration**

- administration requirements of functions, events, banquets, special parties, and conferences within the establishment

### **Contribute to function organisation**

- service requirements of function organisation within the establishment
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## ***DEVELOPING SUPERVISORY ABILITIES***

### **Personal development of supervisory and leadership abilities including:**

- self-management
- decision making
- time management
- team leadership
- communication
- employing and developing the team
- financial ability
- resilience

### **Contributing to the development of teams and individuals**

- range of individual and team needs likely to be necessary for the smooth running of the existing operation
- current routines which encourage individuals and teams to contribute to the identification of their own development needs
- aims and objectives of the establishment in relation to development needs
- individual responsibilities for the planning and implementation of development activities
- procedures for the evaluation of the development activities which have been undertaken

### **Implementing sales development activities**

- range of customer needs the establishment is meeting
- possibilities for additional sales to the current range of customers
- possibilities which may exist for attracting additional customers to the establishment
- limitations on resources available
- individual limits of authority
- methods used for advertising, merchandising, via the internet and social media, through merchandising, and personal selling
- establishment requirements for the planning, implementation, and review of sales

### **Supervise food and beverage operations within licensing (and other) laws**

- what laws need to be observed within the establishment
- where copies of these laws can be obtained
- type of licence(s) the establishment holds
- the procedures of the establishment for ensuring compliance with legislative controls
- individual limits of authority
- those with the powers of entry and enforcement

### **Maintaining data protection**

- customers right to expect that data about them is kept secure and is only used for the published business purposes
- procedures to ensure that information on customers is kept up to date, fairly, lawfully, and securely
- process to ensure customer information is not passed on to third parties without prior consent from the customer
- process for ensuring that staff are aware of the importance of the protection of customer information and the procedures to follow to ensure it is held securely

### **Maintaining the cleaning programme in your own area**

- establishment procedures for cleaning schedules
- systems for the maintenance of materials for cleaning
- individual requirements to carry out inspections
- responsibilities to ensure that the establishment routines are being maintained
- requirements that appropriate action is taken to ensure the maintenance of the clearing programme
- required records
- feedback requirements on the effectiveness of the clearing programme
- routines for proposing required changes to the cleaning routines
- legislation which the cleaning routines needs to comply with

### **Maintaining customer satisfaction**

- how customer satisfaction is monitored
- how to recognise the symptoms of a deterioration in customer relations
- procedures to minimise the causes of customer relations problems

**Improving service reliability for customers**

- how the establishment identifies and responds to customer service needs
- how customer feedback is sought and acted upon
- what initiatives have been taken to improve customer service reliability
- how feedback from staff has been acted upon
- a review of, and possible action to be taken on, current procedures
- how individuals can contribute to and assist in the development of teamwork within the establishment

**Contributing to the control of food and beverage operations**

- standards of performance measures (SOPs)
- procedures for pricing and revenue control
- routines for ordering, receiving, storing, and issuing stock
- environmental conditions for storage which need to be maintained
- limits of authority for those involved
- how security of the stock is maintained
- how the security of revenue is maintained
- how stock taking is carried out
- how new staff are trained
- recording and reporting requirements of the food and beverage operation
- methods of measuring financial performance
- using key performance indicators (KPIs)