

BTEC Level 2 Technical Certificate in  
**FOOD AND BEVERAGE  
SERVICE**



## **SPECIFICATION**

First teaching: September 2017 | First certification: Summer 2018

ISSUE 3





# **Pearson BTEC Level 2 Technical Diploma in Food and Beverage Service**

## **Specification**

First teaching September 2017

Issue 3

## **Edexcel, BTEC and LCCI qualifications**

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This specification is Issue 3. Key changes are listed in the summary table on the page after next of the document. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: [qualifications.pearson.com](https://qualifications.pearson.com)

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## Welcome

With a track record built over 30 years of learner success, BTEC qualifications are widely recognised and respected. They provide progression to the workplace, either directly or via study at higher levels. Proof comes from YouGov research, which shows that 62% of large companies have recruited employees with BTEC qualifications.

### Why are BTECs so successful?

BTECs embody a fundamentally learner-centred approach to the curriculum, with a flexible, unit-based structure. In these new BTEC Level 2 Technicals, the focus is on the development of technical, practical and transferable work-related skills, and sector-specific knowledge. The development of these skills is key for learners to progress to work or to an Apprenticeship.

When creating the BTEC Level 2 Technicals, we worked with employers to ensure that the qualifications meet their needs. Employers are looking for recruits with the appropriate technical knowledge, and technical and transferable skills essential for employment.

The BTEC Level 2 Technicals meet these requirements through:

- a range of occupationally-related qualifications, each with a clear purpose, so that there is a qualification to suit each learner's plan for career progression
- up-to-date content that is closely aligned with employers' needs for a skilled future workforce
- assessments and projects chosen to help learners progress to the next stage. This means that some assessments and projects are set by the centre to meet local needs, while others are set and marked by Pearson. This ensures that there is a core of skills and understanding common to all learners. For example, an externally-set test can be used to check that learners are confident in using technical knowledge to carry out a certain job.

We provide a wealth of support, both resources and people, to ensure that learners and their tutors have the best possible experience during their course. See *Section 11 Resources* and support for details of the support we offer.

### A word to learners...

BTEC Level 2 Technicals will demand a lot of practical work from you. You will need to:

- complete a range of units
- be organised
- take some assessments that Pearson will set and mark
- take other assessments that will demonstrate your technical and practical skills
- keep a portfolio of your assignments.

But you can feel proud to achieve a BTEC because, whatever your plans in life – whether you decide to go on to work or to an Apprenticeship – success in your BTEC Level 2 Technical qualification will help you to progress to the next stage in your life.

Good luck, and we hope you enjoy your course.

## Collaborative development

Learners completing their BTEC Level 2 Technicals will be aiming to go on to employment or to an Apprenticeship. It was essential therefore that we developed these qualifications in close collaboration with experts from professional bodies and businesses, and with the providers who will be delivering the qualifications. We are grateful to all the further education lecturers, tutors, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

Employers, professional bodies and further education providers that have worked with us include:

*Professional Association for Catering Education (PACE)*

*Royal Academy of Culinary Arts*

*The Sloane Club*

*The Ritz London*

In addition, professional bodies and businesses have provided letters of support confirming that these qualifications meet their recruitment requirements. These letters can be viewed on our website.

### Summary of Pearson BTEC Level 2 Technical Diploma in Food and Beverage Service specification Issue 3 changes

Summary of changes made between the previous issue and this current issue	Page number
The wording in <i>Section 8 Teacher/centre malpractice</i> has been updated to clarify suspension of certification in certain circumstances.	Pages 106, 107
The wording under <i>Section 10 Understanding the qualification grade</i> has been updated to clarify current practice in ensuring maintenance and consistency of qualification standards.	Page 111

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# Pearson BTEC Level 2 Technicals

## Introduction

BTEC Level 2 Technicals are intermediate qualifications for post-16 learners who want to specialise in a specific occupation, occupational area or technical role. They prepare learners for work or an Apprenticeship by giving them the opportunity to develop sector-specific knowledge, technical and practical skills, and to apply these skills in work-related environments. The qualifications also provide progression to Level 3 Tech Level qualifications.

Developed in close conjunction with leading employers, BTEC Level 2 Technicals also develop transferable workplace skills, such as good communication and the ability to work in a team, which employers have identified as essential for gaining employment in the sector and for progression once the learner is working.

At the core of these qualifications is the concept of preparing young people for the working world. Through practical activities and occupationally-fit-for-purpose assessments, learners will gain the skills and behaviours needed for sustainable employment.

BTEC Level 2 Technicals are designed to be used flexibly, depending on their size and scope:

- as part of a full-time 16–19 study programme, alongside mathematics and English GCSEs and/or Functional Skills, work placement and enrichment activities
- as the technical qualification within an Apprenticeship or off-the-job training for those already in work
- as a roll-on, roll-off programme for those entering an Apprenticeship or employment.

Pearson has developed the BTEC Level 2 Technicals suite to meet the Department for Education (DfE) requirements for qualifications to be offered as Technical Certificates for 16–19-year-olds.

This specification contains the information you need to deliver the Pearson BTEC Level 2 Technical Diploma in Food and Beverage Service 603/0384/0. The specification signposts you to additional handbooks and policies. It includes all the units for this qualification.

This qualification is a part of the Level 2 Technicals suite for the Hospitality industry.

Other BTEC Level 2 Technicals available for this industry include:

- Pearson BTEC Level 2 Technical Certificate in Patisserie and Confectionery 603/0383/9
- Pearson BTEC Level 2 Technical Extended Diploma in Professional Cookery 603/0382/7

# 1 Pearson BTEC Level 2 Technical Diploma in Food and Beverage Service

## Purpose

### Who is the qualification for?

This qualification is for learners who want to start a career in the hospitality industry in food and beverage service. It is designed for post-16 learners and can be taken as part of a wider study programme. It is an ideal qualification for learners intending to progress to direct employment in food and beverage service or to a hospitality Apprenticeship.

### What does the qualification cover?

The qualification has been developed in consultation with employers in the hospitality industry. This means that it will enable learners to develop the skills and behaviours that give them the best opportunity to be successful in applying for work.

All the content of the qualification is mandatory and relates directly to the skills, knowledge and behaviours expected by employers in the hospitality industry. The areas learners will cover include:

- working in the hospitality industry
- principles of food and beverage service
- enhancing the customer experience
- serving food and beverages
- taking customer payments
- running a hospitality event.

Learners will also cover broader skills in literacy and numeracy, which will help them to progress. Learners will develop other transferable practical skills in communication (working with colleagues and customers), managing information and problem solving.

### What could this qualification lead to?

Achieving this qualification will give learners an advantage when applying for a job in food and beverage service. The types of jobs they will be ready for are:

- bartender
- events coordinator
- food and beverage server
- front-of-house specialist.

The qualification gives learners a sound basis to progress to a Level 3 qualification, when studied in a full study programme, such as the Pearson BTEC Level 3 Certificate in Hospitality, Pearson BTEC Level 3 Subsidiary Diploma in Hospitality, Pearson BTEC Level 3 90-credit Diploma in Hospitality, Pearson BTEC Level 3 Diploma in Hospitality or the Pearson BTEC Level 3 Extended Diploma in Hospitality.

## About the hospitality industry

The hospitality industry is the fourth largest industry in the UK, employing more than 2.9 million people, which makes it larger than other major industries such as financial services, manufacturing, construction, defence and public administration. The hospitality industry has created one-third of all new jobs for 16–24 year olds. The hospitality and tourism industry continues to be a large employer and is experiencing significant growth, contributing £46.5 billion to the UK economy.

In 2013, the hospitality industry contributed £43.2 billion in gross value added (GVA) to the UK economy, an increase of almost 7 per cent from 2012, representing 4.6 per cent of the country's total GVA. This increase was largely driven by the growth in the restaurant industry.

## 2 Structure

### Total Qualification Time (TQT)

For all regulated qualifications, Pearson specifies a total number of hours that it is estimated learners will require to complete and show achievement for the qualification: this is the Total Qualification Time (TQT). Within TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

The Pearson BTEC Level 2 Technical Diploma in Food and Beverage Service is a qualification having:

- Total Qualification Time: 450 hours
- Guided Learning: 360 hours.

Centres should take note of these hours in planning their programme but should also use their professional judgement to determine the provision of guided learning and study time across the units.

### Qualification structure

Learners are required to complete and achieve all the units included in this qualification.

Pearson BTEC Level 2 Technical Diploma in Food and Beverage Service				
Unit number	Unit title	GLH	Type	How assessed
1	Working in the Hospitality Industry	60	Mandatory	External
2	Food and Beverage Service Principles	60	Mandatory	External
3	Enhancing the Customer Experience	30	Mandatory	Internal
4	Food Service Skills	60	Mandatory	Internal
5	Hot and Cold Beverage Service Skills	60	Mandatory	Internal
6	Handling Payments and Maintaining a Payment Point	30	Mandatory	Internal
7	Running a Hospitality Event	60	Mandatory	Internal Synoptic

This qualification has 100% mandatory content and 33% external assessment.

## Qualification and unit content

Pearson has developed the content of this qualification collaboration with employers and representatives from the hospitality industry. The content has been aligned to the National Occupational Standards in Hospitality and the hospitality team member Trailblazer apprenticeship standard. In this way, we have ensured that content is up to date and that it includes the knowledge, technical and practical skills and behaviours required to work in the industry and occupational area.

All units in this qualification are mandatory, which provides a balance of breadth and depth, ensuring that all learners develop the technical and practical skills required in the occupational area. Learners are then offered the opportunity to develop a range of transferable skills and attributes expected by employers. It is expected that learners will apply their learning to relevant employment and industry contexts during delivery and that they will have opportunities to engage meaningfully with employers.

BTECs have always required applied learning that brings together knowledge and understanding (the cognitive domain) with practical and technical skills (the psychomotor domain). This is achieved through learners performing practical, work-related tasks that encourage the development of appropriate work-related behaviours (the affective domain) and transferable skills. Transferable skills are those such as communication, teamwork, and planning and completing tasks to high standards, all of which are valued in the workplace.

Our approach provides rigour and balance and promotes the ability to apply learning immediately in new contexts.

Some of the units within the specification may contain references to legislation, policies, regulations and organisations, which may not be applicable in the country you deliver this qualification in (if teaching outside of England), or which may have gone out-of-date during the lifespan of the specification. In these instances, it is possible to substitute such references with ones that are current and applicable in the country you deliver subject to confirmation by your Standards Verifier.

## Assessment

Assessment is designed to fit the purpose and objective of the qualification. It includes a range of assessment types and styles suited to skills and occupationally-based qualifications at this level.

### External assessment

In this qualification, there are two external assessments, which assess units that contribute to 33% of the total qualification GLH. The external assessments for this qualification take the form of onscreen tests that include a variety of onscreen item types and allow learners to apply their knowledge to several work-related contexts. The external assessments are linked to specific units as indicated in the qualification structure on the previous page.

This method has been used to externally assess the identified units because it is best suited to draw out the evidence to exemplify the expectations of the units.

- *Unit 1: Working in the Hospitality Industry* will give learners a broad overview of the structure, size and scale of the hospitality industry, and the products and services it offers. This unit covers the work skills and personal attributes required for entry to roles in the industry, as well as legislation, professional and business policies, procedures and processes used in hospitality businesses. Therefore, the unit has a broad focus, giving learners underpinning knowledge and understanding of the impact of skills, attributes, legislation, policies, procedures and processes on the provision of products and services in hospitality businesses.
- *Unit 2: Food and Beverage Service Principles* will cover food and beverage products and services that are offered by hospitality businesses, and how to match styles of food and beverage service that are offered by hospitality businesses to meet customers' needs. It will also cover menu design, pairing food and beverage, special dietary requirements

and healthy eating options. By testing aspects of the whole unit content, this assessment ensures learners have a thorough knowledge and understanding of all main areas of food and beverage service provision in the hospitality industry.

Each external assessment is taken under specified conditions, then marked by Pearson and a grade awarded. Learners must achieve both external units at Pass grade or above to achieve the qualification. Learners are permitted to resit the external assessments once during their programme by taking a new assessment.

For further information on external assessment see *Section 7 External assessment*.

### Internal assessment

*Units 3, 4, 5, 6 and 7* are assessed through internal assessment. Internal assessment allows learners to apply technical knowledge and demonstrate mastery of practical and technical skills through realistic tasks and activities. This style of assessment promotes deep learning through ensuring the connection between knowledge and practice.

Internal assessment is through assignments that are subject to external standards verification. We provide suggestions in each unit for setting assignments. This means that you can adapt materials to your local contexts and assess assignments that provide the valid and rigorous final assessment for each unit.

You will make grading decisions based on the requirements and supporting guidance given in the units. Learners must achieve all the internal units at Pass grade or above to achieve the qualification. For further information on internal assessment, including resubmissions, see *Section 6 Internal assessment*.

### Synoptic internal assessment

There is one internal unit that provides the main synoptic assessment for this qualification. This synoptic assessment is designed to take place towards the end of the programme and draws on the learning throughout. The design of this assessment ensures that there is sufficient stretch and challenge, enabling the assessment of sector-related knowledge and technical and practical skills at the end of the learning period.

The synoptic assessment for this qualification is based on *Unit 7: Running a Hospitality Event* and takes the form of a practical task that requires learners to consider and select content that will enable them to apply their knowledge and skills from across the other units in an integrated way to a realistic work situation.

In delivering the unit, you need to encourage learners to draw on their broader learning so that they are prepared for the assessment.

### Language of assessment

Assessment of the internal and external units for this qualification will be available in English. All learner work must be in English. A learner taking the qualifications may be assessed in British sign language where it is permitted for the purpose of reasonable adjustment. For information on reasonable adjustments see *Section 8 Administrative arrangements*.

### Grading of the qualification

Achievement in the qualification requires a demonstration of depth of study in each unit, assured acquisition of the practical skills required for employment in the specific sector and successful development of transferable skills.

Units are assessed using a grading scale of Distinction, Merit, Pass and Unclassified. All units in the qualification contribute proportionately to the overall qualification grade.

The qualification is graded using a scale of PP to DD. Please see *Section 10 Understanding the qualification grade* for more details.

The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of learner performance and in consultation with key users of the qualification.

## Employer involvement

Employer involvement in the delivery and/or assessment of technical qualifications provides a clear 'line of sight' to work, enriches learning, raises the credibility of the qualification in the eyes of employers, parents and learners, and furthers collaboration between the learning and skills sector and industry.

You need to ensure that all learners have the opportunity to undertake meaningful activity involving employers during their course.

Examples of 'meaningful activity' include:

- structured work experience or work placements that develop skills and knowledge relevant to the qualification/industry. Note: Simulated work environments cannot be used for work experience e.g. college restaurants
- project(s), exercise(s) and/or assessments/examination(s) set with input from industry practitioner(s)
- units delivered or co-delivered by an industry practitioner(s); this could take the form of master classes or guest lectures
- industry practitioners operating as 'expert witnesses' that contribute to the assessment of a learner's work of practice, operating within a specified assessment framework. This may be a specific project(s), exercise(s) or all assessments for a qualification.

Meaningful employer involvement, as defined above, must be with employers from the hospitality industry and should contribute significantly to at least one mandatory unit.

We have also provided suggestions in the units on how employers could become involved in the delivery and/or assessment of this qualification. These units are listed below:

- Unit 1: Working in the Hospitality Industry
- Unit 2: Food and Beverage Service Principles
- Unit 3: Enhancing the Customer Experience
- Unit 4: Food Service Skills
- Unit 5: Hot and Cold Beverage Service Skills
- Unit 6: Handling Payments and Maintaining a Payment Point
- Unit 7: Running a Hospitality Event.

These are suggestions only and there will be other possibilities at local level. Centres may choose to use other approaches but must ensure that these meet the requirement for meaningful employer involvement as defined above. Centres must have an employer involvement plan in place at the start of the programme. It must detail their approach to employer involvement and how it will add value to the delivery and assessment of the qualification.

Each centre's approach to employer involvement will be monitored in two ways. It will be monitored at centre level as part of the annual quality management review process and captured as part of the standards verification process that addresses centre strategy for delivery, assessment and quality assurance, when we will ask you to show evidence of how employer involvement is provided for all learners. You will need to show evidence in order to gain reporting clearance for certification. It will also be monitored at programme level as part of the standards verification process to confirm that plans for employer involvement meet the requirements of the specification. These approaches are designed to ensure that additional activities can be scheduled where necessary so that learners are not disadvantaged (see *Section 9: Quality assurance*).

## 3 Units

### Understanding your units

The units in this specification set out our expectations of assessment in a way that helps you to prepare your learners for assessment. The units help you to undertake assessment and quality assurance effectively.

Each unit in the specification is set out in a similar way. There are two types of unit format:

- internal units
- external units.

This section explains how the units work. It is important that all tutors, assessors, internal verifiers and other staff responsible for the programme read and are familiar with the information given in this section.

#### Internal units

Section	Explanation
<b>Unit number</b>	The number is in a sequence for the qualification.
<b>Unit title</b>	This is the formal title of the qualification and appears on certificates.
<b>Level</b>	All units are at Level 2 on the national framework.
<b>Unit type</b>	This says if the unit is mandatory or optional for the qualification. See <i>Section 2 Qualification structure</i> for details.
<b>Assessment type</b>	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See <i>Section 2 Qualification structure</i> for details.
<b>GLH</b>	Units may have a GLH value of 30 or 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
<b>Unit in brief</b>	A brief formal statement on the content of the unit that is helpful in understanding its role in the qualification. You can use this in summary documents, brochures etc.
<b>Unit introduction</b>	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
<b>Learning aims</b>	These help to define the scope, style and depth of learning of the unit. You can see where learners should be developing and demonstrating their skills or where they should be actively researching or reviewing.
<b>Unit summary</b>	This section helps tutors to see at a glance the main content areas against the learning aims and the structure of the assessment. The forms of evidence given are suitable to fulfil the requirements.
<b>Content</b>	This section sets out the required teaching content of the unit. Content is compulsory except when shown as 'e.g.'. Learners should be asked to complete summative assessment only after the teaching content for the unit or learning aim(s) has been covered.

Section	Explanation
<b>Assessment criteria</b>	Each learning aim has assessment criteria to explain the achievement required to obtain Pass, Merit and Distinction grades.
<b>Essential information for assessment decisions</b>	This information gives guidance for each learning aim or assignment of the expectations for Pass, Merit and Distinction standard. This section contains examples and essential clarification. It is important that this is used carefully alongside the assessment criteria.
<b>Assessment activity</b>	This section provides information, suggested scenarios and tasks for summative assessment activities.
<b>Further information for tutors and assessors</b>	The section gives you information to support the delivery and assessment of the unit.
<b>Delivery guidance</b>	This section offers suggestions of ways of delivering the unit. It offers ideas on practical activities in a sector context that can be used to help develop relevant skills and to encourage progress.
<b>Essential resources</b>	Any specific resources that you need to be able to teach and assess are listed in this section. For information on support resources see <i>Section 11 Resources and support</i> .
<b>Links to other units</b>	This section shows you the main relationships of units to other units. This can help you to structure your programme and make the best use of available materials and resources.
<b>Employer involvement</b>	This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.

## External units

Section	Explanation
<b>Unit number</b>	The number is in a sequence for the qualification.
<b>Unit title</b>	This is the formal title of the qualification and appears on certificates.
<b>Level</b>	All units are at Level 2 on the national framework.
<b>Unit type</b>	This says if the unit is mandatory or optional for the qualification. See <i>Section 2 Qualification structure</i> for details.
<b>Assessment type</b>	This says how the unit is assessed – i.e. whether it is external, internal or synoptic internal. See <i>Section 2 Qualification structure</i> for details.
<b>GLH</b>	Units have a GLH value of 60 GLH. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
<b>Unit in brief</b>	A brief formal statement on the content of the unit.
<b>Unit introduction</b>	This is designed with learners in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
<b>Summary of assessment</b>	This sets out the type of external assessment used and the way in which it is used to assess achievement.
<b>Assessment outcomes</b>	These show the hierarchy of knowledge, understanding, skills and behaviours assessed. For tested units, they include information on how this hierarchy relates to command terms in sample assessment materials (SAMs).
<b>Essential content</b>	For external units all the content is obligatory, the depth of content is indicated in the assessment outcomes and sample assessment materials (SAMs). The content will be sampled through the external assessment over time, using the variety of questions or tasks shown.
<b>Grade descriptors</b>	We use grade descriptors when making judgements on grade boundaries. You can use them to understand what we expect to see from learners at particular grades.
<b>Key terms typically used in assessment</b>	These definitions will help you to analyse requirements and to prepare learners for assessment.
<b>Links to other units</b>	This section shows the main relationships of units to other units. This section can help you to structure your programme and make the best use of available materials and resources.
<b>Employer involvement</b>	This section gives you information on the units that can be used to give learners involvement with employers. It will help you to identify the kind of involvement that is likely to be successful.

## Units

This section contains all the units developed for this qualification.

Unit 1: Working in the Hospitality Industry	14
Unit 2: Food and Beverage Service Principles	26
Unit 3: Enhancing the Customer Experience	38
Unit 4: Food Service Skills	48
Unit 5: Hot and Cold Beverage Service Skills	58
Unit 6: Handling Payments and Maintaining a Payment Point	70
Unit 7: Running a Hospitality Event	80



## Unit 1: Working in the Hospitality Industry

Level: **2**

Unit type: **Mandatory**

Assessment type: **External**

Guided learning hours: **60**

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### Unit in brief

Learners investigate the hospitality industry and its employment opportunities. They will gain valuable knowledge of the importance of maintaining personal and workplace standards and their role in ensuring business success.

### Unit introduction

Hospitality is one of the largest industries in the UK. It has over two million employees and makes a significant contribution to the UK economy. It is a dynamic industry that responds quickly to changing market needs, through rapid growth, innovation and diversity. This enables the hospitality industry to offer many different types of employment, with opportunities for you to work in the UK and around the world.

In this unit, you will explore different aspects of the hospitality industry by looking at the businesses in it and the different products and services it provides. You will explore how these products and services are offered in a range of settings to meet the requirements of different hospitality areas. You will investigate the job roles and employment opportunities in the hospitality industry and gain an understanding of the skills you need to be successful in the industry, whatever job role you undertake. All staff working in hospitality businesses are responsible for maintaining personal and organisational standards. You will learn about the importance of following appropriate procedures to maintain business success in a competitive market.

This unit will give you the knowledge and understanding to progress towards service-based roles, such as commis chefs, junior pastry chefs, food and beverage servers, and events coordinators.

### Summary of assessment

This unit is assessed using an onscreen test, set and marked by Pearson. The test contains different types of question and is worth 60 marks. The test duration is 75 minutes. The assessment availability on demand. The first assessment is available in January 2018.

Sample assessment materials will be available to help centres prepare learners for assessment.

### Assessment outcomes

**AO1** Demonstrate knowledge of structure, size and scale of the hospitality industry, and the products and services it offers

Command words: describe, give, identify, list, state

Marks: ranges from 1 to 2 marks

**AO2** Demonstrate understanding of the work skills and personal attributes required for successful entry to roles in the hospitality industry, and how these skills and attributes impact on businesses in the industry

Command words: describe, discuss, explain, give, identify, list, state

Marks: ranges from 1 to 4 marks

**AO3** Analyse and evaluate the impact of legislation, professional and business policies, procedures and processes in promoting consistent and reliable products and services in hospitality businesses and their impact on supporting business vision and values

Command words: analyse, apply, describe, discuss, evaluate, explain

Marks: ranges from 1 to 6 marks

**AO4** Make connections between business success, vision and values, and the application of business procedures that contribute to consistent and reliable products and service

Command words: analyse, apply, describe, discuss, evaluate, explain

Marks: ranges from 1 to 6 marks

## Essential content

The essential content is set out under content areas. Learners must cover all specified content before the assessment.

### A The hospitality industry

Hospitality businesses include organisations in the hospitality industry.

#### A1 Products and services in the hospitality industry

The range of products and services offered by the hospitality industry and how the standard and quality of these can impact positively and negatively on the performance of businesses.

- Products:
  - food
  - beverages
  - accommodation.
- Services:
  - food and beverage service provision to other industries
  - facilities management
  - leisure
  - event management
  - vending.

#### A2 The structure of the hospitality industry

The types of business that make up the hospitality industry and their aims, characteristics and typical services.

- Accommodation:
  - hotel
  - guest houses and bed and breakfast (B&B) accommodation
  - hostels
  - halls of residence.

The different types of accommodation board bases, their aims and characteristics.

- Accommodation board bases:
  - all inclusive – accommodation, breakfast, lunch, dinner, snacks, drinks
  - full-board – accommodation, breakfast, lunch, dinner
  - half-board – accommodation, breakfast, dinner
  - bed and breakfast – accommodation, breakfast
  - self-catering – no meals but kitchen facilities provided
  - room only.
- Restaurants:
  - takeaways and fast food outlets
  - cafes, coffee shops
  - restaurants
  - classification by cuisine.
- Pubs, bars and nightclubs.
- Contract caterers – catering outsourced to support other industry sectors and businesses within them, to include travel, business, retail, education, health care, remote and offshore locations, corporate hospitality, government and local authority provision, armed services, leisure venues and events.

- Hospitality services – catering managed in-house to support other industry sectors, to include travel, business, retail, education, health care, remote and offshore locations, corporate hospitality, government and local authority provision, armed services, leisure venues and events. As well as providing food and drink, hospitality services increasingly provide 'facilities management'.
- Events.
- Membership clubs.

### **A3 The size and location of businesses in the hospitality industry**

The scope and range of the hospitality industry and how this can affect career choices and career progression.

- Industry size and location:
  - location – local, national, international
  - size of business – small to medium independent, large chain.

### **A4 Business ownership in the hospitality industry**

How the range of hospitality businesses are owned and the similarities and differences between each type of ownership.

- Sole traders.
- Partnerships.
- Limited companies.
- Franchises.
- Public limited companies (PLCs).

## **B Employment skills and attributes in the hospitality industry**

The employment skills and attributes required for successful entry into the hospitality industry and how these skills and attributes can contribute to the success of a hospitality business, its customers and its staff.

### **B1 Job roles in the hospitality industry**

The different job roles and career progression opportunities available in the hospitality industry.

- Job roles and progression routes, including:
  - kitchen – porter, commis chef, chef de partie, sous-chef, pastry chef, head chef
  - food and beverage – bar person, barista, food server, food and beverage supervisor, restaurant manager
  - front office – receptionist, night porter, concierge, night auditor, reservations manager, front office manager
  - housekeeping – house porter, room service attendant, housekeeper, head housekeeper
  - conference and banqueting – banqueting porter, conference and events organiser, conference and events manager.

### **B2 Effective working skills in the hospitality industry**

The work skills and attributes required for successful entry to the hospitality workplace.

- Occupational skills:
  - cooking skills
  - food service skills
  - drinks service skills
  - accommodation skills
  - front office skills
  - customer service skills
  - promotional and selling skills.

## UNIT 1: WORKING IN THE HOSPITALITY INDUSTRY

- Personal presentation and attributes:
  - personal hygiene and appearance
  - patience
  - tact
  - diplomacy
  - effective teamwork skills
  - honesty
  - initiative
  - self-motivation
  - organisation of own work
  - positive attitude
  - courtesy
  - showing an interest.

### **B3 Communication in the hospitality industry**

The importance of using and interpreting appropriate methods of communication that are suitable for different situations and individuals' needs in a variety of hospitality contexts and how communication can impact on the business.

- Verbal:
  - face to face, on the telephone
  - speaking – the use of appropriate language, tone, pitch, pace, volume, clarity, avoiding use of jargon.
- Non-verbal:
  - body language – posture, facial expression, hand gestures, eye contact
  - personal presentation.
- Written:
  - letter, email, fax, leaflets, questionnaires, complaint forms, accident reports.
- Formal – official messages sent by an organisation to customers and team members.
- Informal – messages not formally approved by the business, to include everyday conversation and gossip.
- Listening skills – asking customers appropriate questions, repeating back important information to customers, looking attentive.
- Appropriateness of communication style to the situation – urgent, non-urgent, difficult, routine, customers, colleagues and team members from a diverse range of backgrounds and cultures, dealing with confrontation, conflict with colleagues, complaints from customers.

### **B4 Teamwork in hospitality**

How supporting the work of a team can benefit self, customers, colleagues and improve the performance of an individual hospitality business.

- Benefits of helping others – encourages teamwork, improves efficiency, team morale, self-satisfaction and motivation; rewards (personal, financial, non-financial).
- Importance of communication in teams – roles and responsibilities (self and other team members) clearly defined, tasks are performed to agreed standards/standards of work are maintained, team efficiency is improved, mistakes are avoided, information is shared.
- Importance of maintaining good working relationships – reduction in problems in working relationships, less personal disagreement/conflict, providing support to others.

## **B5 The impact of effective working skills on a hospitality business, its customers and staff**

How effective working skills can contribute to the success of a selected hospitality business, its customers and staff.

- Benefits to businesses:
  - improved efficiency and ability to meet work deadlines and business goals
  - establishing and maintaining a good reputation for the business
  - encouraging repeat custom and customer loyalty
  - boosting staff morale, creating a positive working environment and improving working relationships with customers and colleagues
  - gaining competitive advantage.
- Benefits to customers:
  - promoting reliability and trust in products and services
  - enhancing the customer experience.
- Benefits to staff:
  - transferability of skills
  - self-motivation and self-confidence
  - improving own job performance and productivity
  - supporting career prospects and progression
  - improving earning potential.
- Staffing – working conditions, including pay, hours and breaks, and possible impacts on staff.

## **C Providing consistent and reliable products and service**

### **C1 Food safety legislation and its application in the hospitality industry**

The food safety legislation and how it is applied throughout the hospitality industry to ensure consistent and safe products, and how standards and quality can impact positively and negatively on the performance of a hospitality business.

- Safety legislation (as current at time of delivery), including requirements for food standards, food hygiene, risk assessment legislation.
- Importance of food hygiene:
  - reducing the spread of bacteria
  - preventing cross-contamination
  - compliance with legal requirements
  - promoting a positive image of the organisation.
- Food safety procedures and how individuals can take personal responsibility for food safety:
  - operation of a food-safety management system
  - risk assessment
  - safe food handling and behaviour
  - duty of care.
- Food hazards:
  - microbial/biological – bacteria, yeasts, mould
  - chemical – cleaning materials, insecticides, rodent poison
  - physical – hair, insects, machinery parts, packaging, dirt from kitchen or premises
  - main allergens – celery, cereals that contain gluten, crustaceans, eggs, fish, lupin, milk, molluscs, mustard, nuts, peanuts, sesame seeds, soybeans, sulphur dioxide, sulphites.

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- Vehicles of contamination:
  - hands, clothing, work surfaces, equipment – knives, chopping boards, cloths.
- Reporting hazards food safety procedures:
  - reporting to line manager
  - types of reportable problems – unhygienic tools, defective equipment, defective walls, surfaces, floors, accidents, slips, trips, pests, other hazards.
- Personal hygiene practices:
  - six step hand washing technique before handling food – rub palm to palm, rub the back of both hands, rub palm to palm interlacing fingers, rub the back of fingers interlocking hands, rub thumbs, rub palms with fingertips
  - clean personal presentation – clean uniform, clean hair, appropriate footwear
  - hair tied up and back and covered
  - no jewellery or watches
  - bodily hygiene and freshness – discrete use of cosmetics, short fingernails, no nail varnish, clean hands, care when coughing or sneezing
  - reporting cuts and wounds, covering of cuts and wounds with appropriate dressings.
- Cleaning procedures:
  - using correct manufacturer's and business cleaning procedures – use, dilutions, storage
  - using correct cleaning chemicals and materials
  - four-step cleaning method – removing debris, washing, sanitising, air dry
  - checking for cleanliness and good hygiene
  - checking for safety
  - cleaning schedules – daily, weekly, monthly, as required, method of cleaning.
- Storage of food:
  - correct temperatures for the storage of raw and ready-to-eat foods, chilled food (below 5 °C), frozen foods (below –18 °C)
  - using correct defrosting procedures
  - preventing cross-contamination – separation of raw and ready-to-eat foods, separation of foods with known allergens, use of containers and wrapping
  - recognising unsafe foods – sight, smell, temperature
  - stock rotation, storage times, first-in first-out (FIFO), date marking, use-by dates, best before dates
  - checking for damage – blown cans, broken bottle seals, insect/pest damage.
- Preparation of food:
  - preventing cross-contamination – using appropriate and suitable surfaces and equipment.
- Cooking food and reheating:
  - applying correct cooking temperatures for different foods of 75 °C or above
  - ensuring reheated food reaches a temperature of 82 °C
  - probing food to check temperature and recording.
- Serving and holding:
  - using clean dishes and serving equipment, using gloves
  - holding at appropriate temperatures of 63 °C or above
  - probing food to check temperature and recording.
- The importance of temperature monitoring – complying with legislation, maintaining safe standards, maintaining business reputation.

## C2 Health and safety legislation and its application in the hospitality industry

The health and safety legislation and how it is applied throughout the hospitality industry to ensure a safe environment and how standards and quality can impact positively and negatively on the performance of a hospitality business.

- Relevant sections of health and safety legislation (as current at time of delivery):
  - health and safety responsibilities
  - principles of health and safety
  - employee/personal responsibilities – take care of own health and safety at work, take care of the health and safety of others, cooperate with employer, use and care of personal protective equipment (PPE), attend training.
- Common workplace hazards:
  - definition – hazard, something that has the potential to cause harm
  - different areas – kitchen, restaurant, bar, front desk, housekeeping
  - spillages, trip hazards, working at heights, breakages, hot surfaces, chemicals.
- Workplace emergencies:
  - accidents
  - fire
  - breaches of security
  - illness.
- Safety procedures in the workplace:
  - following fire procedures, raising the alarm, fire drills, evacuation
  - manual handling and safe lifting techniques
  - safe use and storage of chemicals
  - safety signs – prohibition, hazard, mandatory, safe condition
  - importance – safer workplace, fewer accidents and injuries, good business reputation
  - effects of non-compliance – prosecution, fines, dismissal.
- Reporting procedures:
  - legal responsibilities
  - departmental responsibilities – line manager, supervisor.
- Reporting of accidents and near accidents:
  - reasons for – preventing further accidents, risk assessment
  - legal requirements – accident book, Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 1995
  - reporting to – supervisor, manager, health and safety representative, first aider.
- First aid:
  - First-aid procedures – raising alarm, registered first aider, quick response
  - signage and location of first-aid box, defibrillator
  - legal requirements – accident book, RIDDOR.

## C3 Business standards and procedures

The business standards and procedures that businesses in the hospitality industry can implement to provide consistent and reliable products and services.

- Customer service standards and procedures.
- Equality and accessibility to goods and services.
- Environmental, sustainability and ethical standards and procedures – recycling, carbon footprint, food miles, use of fair trade products, animal welfare, reduce packaging, composting, use of disposables.

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- Security procedures:
  - premises – control of keys, electronic systems, surveillance, control of entrances and exits
  - staff and visitor identity badge – issue, reporting loss
  - preventing and detecting theft and fraud in hospitality businesses
  - reporting of suspicious persons and packages to line manager
  - receiving and issuing of stock
  - impact of poor security.
- Ensuring that correct standards and procedures are followed:
  - training, inductions, supervising staff and monitoring their performance
  - clearly defined roles and responsibilities
  - setting workplace rules and procedures and checking staff compliance
  - using legal disciplinary and grievance procedures.
- Recognition through quality and classification systems:
  - AA star ratings, Rosette awards, Michelin star
  - Visit Britain star ratings.

### **C4 The purpose of business procedures that contribute to consistent and reliable products and service**

The importance for businesses in the hospitality industry to implement procedures, policies and practices.

- Ensuring staff compliance with expected standards of service.
- Ensuring the workplace environment is productive.
- Ensuring business mission/vision statements are followed.
- Ensuring the business matches any competing business offer.
- Ensuring compliance with legislation.

### Grade descriptors

To achieve a grade learners are expected to demonstrate these attributes across the essential content of the unit. The principle of best fit will apply in awarding grades.

#### Level 2 Pass

Learners will be able to demonstrate knowledge and understanding of how the hospitality industry is structured, the types of business in the industry and the products and services it provides. They are able to demonstrate knowledge and understanding of how hospitality businesses are owned and the size and location of businesses in the hospitality industry. They will have an understanding of the job roles in the hospitality industry and the work skills and personal attributes required for successful entry to the hospitality industry. They will be able to demonstrate knowledge and understanding of how hospitality businesses use legislation, business standards and procedures to provide consistent and reliable products and services, with some appreciation of the benefits, drawbacks and impacts on hospitality businesses.

#### Level 2 Distinction

Learners will be able to demonstrate a thorough knowledge and understanding of how the hospitality industry is structured, the types of business in the industry and the products and services it provides, bringing together understanding of how each business is owned and how the size and location of hospitality businesses impacts on job roles and career opportunities available. Learners will have an in-depth knowledge and understanding of the job roles in the hospitality industry and the work skills and personal attributes required for successful entry to the hospitality industry. They will make connections with legislation, business standards and procedures used to provide consistent and reliable products and services to be able to make effective judgements of the positive and negative impact of the application of these in a hospitality context.

### Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure learners are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

Command or term	Definition
Analyse	Learners present the outcome of methodical and detailed examination: <ul style="list-style-type: none"> <li>• either by breaking down a theme, topic or situation in order to interpret and study the interrelationships between the parts and/or</li> <li>• of information or data to interpret and study key trends and interrelationships.</li> </ul> For example, 'Analyse the reason...'.
Apply	Learners put knowledge, understanding or skills into action in a particular context. For example, 'Apply concepts...'.
Classify	Learners arrange a group of items in classes or categories according to shared qualities or characteristics. For example, 'Classify information...'.

Command or term	Definition
Compare	Learners identify the main factors relating to two or more items/situations or aspects of a subject that is extended to explain the similarities, differences, advantages and disadvantages. For example, 'Compare procedures...'
Describe	Learners give a clear, objective account in their own words, showing recall and, in some cases application, of the relevant features and information about a subject. For example, 'Describe one characteristic...'
Discuss	Learners consider different aspects of a topic, how they interrelate and the extent to which they are important. For example, 'Discuss the work...'
Evaluate	Learners draw on varied information, themes or concepts to consider aspects such as: strengths or weaknesses, advantages or disadvantages, alternative actions, relevance or significance. Learners' enquiries should lead to a supported judgement, showing relationship to its context. This will often be in a conclusion. For example, 'Evaluate two ways in which...'
Explain	Learners show clear details and give reasons and/or evidence to support an opinion, view or argument. They could show how conclusions are drawn (arrived at). Learners show that they comprehend the origins, functions and objectives of a subject, and its suitability for purpose. For example, 'Explain one way in which...'
Give	Learners state or put forward information or argument. For example, 'Give one example...'
Identify	Learners indicate the main features or purpose of something, and/or being able to discern and understand facts or qualities. For example, 'Identify two products...'
List	Learners give a number of connected items or names consecutively. For example, 'List two products...'
Match	Learners suitably associate a pair. For example, 'Match each...'
Name	Learners identify a class or category of things, either uniquely, or within a given context. For example, 'Name one...'

Command or term	Definition
Select	Learners choose the best or most suitable option. For example, 'Select an appropriate...'
State	Learners express something definitely or clearly. For example, 'State two organisations...'
Which	Learners specify one or more items from a definite set. For example, 'Which of these types of...'

### Links to other units

This unit links to all other units in the Level 2 Hospitality Technical Certificate suite of qualifications.

#### **Pearson BTEC Level 2 Technical Certificate in Patisserie and Confectionery**

- Unit 2: Produce Biscuits, Cakes, Sponges and Desserts
- Unit 3: Produce Dough and Pastry Products
- Unit 4: Patisserie and Confectionery Catering Operations

#### **Pearson BTEC Level 2 Technical Diploma in Food and Beverage Service**

- Unit 2: Food and Beverage Service Principles
- Unit 3: Enhancing the Customer Experience
- Unit 4: Food Service Skills
- Unit 5: Hot and Cold Beverage Service Skills
- Unit 6: Handling Payments and Maintaining a Payment Point
- Unit 7: Running a Hospitality Event

#### **Pearson BTEC Level 2 Technical Extended Diploma in Professional Cookery**

- Unit 2: Kitchen Operations
- Unit 3: Prepare and Cook Stocks, Soups and Sauces
- Unit 4: Prepare and Cook Fruit and Vegetable Dishes
- Unit 5: Prepare and Cook Meat, Poultry and Offal Dishes
- Unit 6: Prepare and Cook Fish and Shellfish Dishes
- Unit 7: Prepare and Cook Rice, Pasta, Grain and Egg Dishes
- Unit 8: Produce Hot and Cold Desserts
- Unit 9: Produce Pastry Products
- Unit 10: Provide a Professional Kitchen Service.

### Employer involvement

This unit would benefit from employer involvement in the form of:

- Guest lecturers by food and beverage experts on, food safety and health and safety legislation and their application in the hospitality industry, business standards and procedures.

## Unit 2: Food and Beverage Service Principles

Level: **2**

Unit type: **Mandatory**

Assessment type: **External**

Guided learning hours: **60**

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### Unit in brief

Learners investigate the importance of the meal experience and gain the knowledge needed to prepare and provide an efficient food and beverage service.

### Unit introduction

If you enjoy working hard in a busy environment, appreciate food and beverages, and like interaction with customers and work colleagues, then there are many food and beverage service job opportunities in an exciting range of businesses at home and abroad, on land, sea, and in the air. This unit introduces you to the importance of identifying the needs and expectations of customers in a food and beverage business. You will gain the knowledge and skills required to meet and, ideally, exceed these needs by delivering an attentive and effective service, providing a high-quality meal experience.

Customers are increasingly aware of the need to eat and drink more healthily and often want to know where and how their food and beverage is produced. You will explore customer perceptions of healthy and ethical eating and drinking, and how wine and other beverages may be paired with food. You will discover how staff may assist customers in their choices. Food and beverage service staff are expected to contribute to ensuring the profitability of their business and you will investigate how this may be achieved. There is also an expectation that you will adhere to the law in your work. You will learn about the importance of complying with current and relevant legislation and following appropriate procedures. This will ensure you provide your customers with the food and beverages they have ordered and also serve alcohol to those who are eligible to consume it.

This unit will give you the knowledge and understanding to progress to a service-based role specialising in food, beverage and/or events services working in a professional hospitality setting such as a conference centre, restaurant or hotel.

### Summary of assessment

This unit is assessed using an onscreen test, set and marked by Pearson. The test contains different types of question and is worth 60 marks. The test duration is 75 minutes. The assessment is available on demand. The first assessment is available in January 2018.

Sample assessment materials will be available to help centres prepare learners for assessment.

### Assessment outcomes

**AO1** Demonstrate knowledge of food and beverage products and services that are offered by hospitality businesses

Command words: describe, explain, identify, match

Marks: ranges from 1 to 4 marks

**AO2** Demonstrate understanding of how to match styles of food and beverage service that are offered by hospitality businesses to meet customers' needs

Command words: compare, describe, explain, identify, match

Marks: ranges from 1 to 4 marks

**AO3** Analyse and evaluate information related to the effective provision of a food and beverage service

Command words: analyse, apply, classify, describe, evaluate, explain

Marks: ranges from 1 to 6 marks

**AO4** Make connections between menu design, pairing food and beverage, special dietary requirements and healthy eating options

Command words: analyse, discuss, evaluate

Marks: ranges from 1 to 6 marks

## Essential content

The essential content is set out under content areas. Learners must cover all specified content before the assessment.

### A Principles of food and beverage service

Hospitality businesses include organisations in the hospitality industry.

#### A1 Styles of food and beverage service

The ways in which customers are served food and beverages and the types of businesses in which they might be found.

- Table:
  - plated
  - platter or silver service
  - family service
  - gueridon
  - bar counter.
- Other service concepts:
  - hot and cold buffets (self-service, assisted)
  - carvery
  - self-service – cafeteria, counter, free-flow, echelon, supermarket
  - single-point service – takeaway, fast food, vending, kiosks, food court, bar
  - tray, trolley, home delivery, lounge, room, drive-in
  - specialised (in situ) – hospitals, aircraft, home delivery, lounge and room service.
- Different types of service in hospitality businesses:
  - hotels – budget, one star to five star
  - restaurants – fast-food businesses to fine dining
  - pubs, bars and nightclubs
  - contract food service providers – college, school, university, healthcare, prisons, residential home, in the workplace
  - hospitality services – retail, education, government and local authority provision
  - membership clubs – professional or employment association clubs, sporting clubs, political clubs
  - events – music events, meetings and conferences.

#### A2 Customer types in hospitality and how customers have different needs

The types of customers using food and beverage businesses and how these may be linked to their needs and expectations.

- Types of customer:
  - internal customers – working in business (colleagues, supervisors, staff working in other departments)
  - external customers – outside business (customers obtaining products and/or services)
  - individuals, couples, existing/repeat, new, small/large groups, corporate, business travellers, VIPs, people with young children, different age groups (children, teenagers, middle aged, pensioners), dietary requirements
  - challenging customers – any customer where communication difficulties and interactions need to be overcome
  - dissatisfied customers – those unhappy with product offer or purchase, those unhappy about service received

- cultural factors – language, nationality, age, beliefs, social attitudes and behaviours (formality of greeting, professional behaviours, personal space, social interactions), language (tone of voice, communication style), values (perception of right or wrong, ethics, environmental responsibility, lifestyle).
- Customer needs – physiological, economic, social, psychological, convenience.
- Why customers use food and beverage businesses in terms of pleasure, necessity and convenience:
  - celebration or special occasion
  - meal with friends
  - conference, function
  - during a shopping trip
  - in hospital
  - when travelling
  - corporate – business meeting, entertaining clients.
- Factors contributing to the 'meal experience':
  - choice, quality, quantity and appearance of food and beverage
  - level of service
  - value for money
  - timing (urgent, non-urgent)
  - special requirements
  - healthy, safe and secure environment
  - ambience
  - suitability for purpose
  - level of privacy
  - increasing desire to achieve a balanced diet.
- Requirements of different dietary needs:
  - linked to health – low salt, low sugar, low fat, allergens
  - foods that may trigger allergies – celery, cereals that contain gluten, crustaceans, eggs, fish, lupin, milk, molluscs, mustard, nuts, peanuts, sesame seeds, soybeans, sulphur dioxide, sulphites
  - additives – artificial colourings, artificial flavourings, chemical preservatives
  - linked to lifestyle – vegetarian, vegan
  - linked to religion – Hinduism, Judaism, Islam, Sikhism, Rastafarianism, Christianity
  - linked to disability
  - linked to ethical influences – organic, locally sourced, free range, fair trade, animal welfare, sustainability of foods consumed, genetically modified (GM) foods, reduced packaging, environmental issues.

## **B Products and services offered by hospitality industry businesses**

### **B1 The food menu and dish composition**

Types of menu and their structure and the types, names and description of typical dishes that are to be found on them and recognition, selection and purpose of appropriate equipment, supplies, condiments, accompaniments and ingredients.

- Types of menu and their content:
  - à la carte
  - table d'hôte/menu du jour/set menu
  - fixed price with or without beverage included
  - tasting menu
  - function and event menus – wedding, formal dinner, cocktail party, special event promotion, conference, banquets

## UNIT 2: FOOD AND BEVERAGE SERVICE PRINCIPLES

- o breakfast menu
- o afternoon tea menu
- o floor/room service menu
- o lounge service menu
- o hospital/airline tray service and rail service menu
- o additional information – price supplements, special seasonal dishes, dishes of the day, promotions, marketing campaigns, unique selling points.
- Food types and their order of service:
  - o canapés and other appetisers, soups, egg dishes, pasta and rice dishes, vegetarian dishes, meat alternatives, fish, meats, poultry, game, vegetables, salads, accompaniments, sauces and dressings, cold buffet, cheese, sweets, savoury, dessert fruit.
- Service equipment for food – crockery, cutlery, service utensils, trays, service cutlery, salvers, service cloths, napkins and other linen items, food containers, refrigerated units, heated units.
- Service supplies – menus/promotional items, napkins, table coverings.
- Condiments, accompaniments and ingredients needed for different types of food – seasonings, cream, prepared sauces/dressings, prepared bread items.

### **B2 Beverages lists and the characteristics of different types of alcoholic, low-alcohol and non-alcoholic beverages**

Understand types of lists, their content and characteristic of types of alcoholic, low-alcohol and non-alcoholic beverages that may be found on them and how they are served.

- Types of lists – wine lists, bar and cocktail, restaurant, after-meal/digestifs, banqueting and events, room service, lounge service.
- Types of wine – red, white, rosé, sparkling, champagne, fortified, dessert/sweet, low-alcohol, non-alcoholic.
- Main grape varieties:
  - o white wine – Chardonnay, Pinot blanc, Pinot grigio, Riesling, Sauvignon blanc
  - o red wine – Merlot, Cabernet Sauvignon, Pinot noir, Shiraz.
- Origin – country, region.
- Characteristics of wine – dry and medium dry, sweet, full bodied, delicate, big, rich, oak, tannin, acidity, maturity:
  - o fortified wines – sherry, port, Madeira, marsala
  - o dessert wines – Sauternes, Muscat, Tokaji, sweet Riesling
  - o information on a wine label – name of the wine, country of production, alcoholic strength in percentage by volume (% vol.), contents in litres, cl or ml, name and address or trademark of the supplier, grape variety, vintage, the region in which the wine was made, quality category of the wine, details of the bottler and distributor, health warnings, lot number
  - o faults that can occur with wine – corked wines, oxidation, sediment
  - o appropriate temperatures for service – chilled, room temperature
  - o traditional service of wine – before any food service, presenting wine, removing cork/screw cap, holding of bottle, etiquette of service, sequence of service, at the correct temperature, correct pouring of wine, filling of glasses, when and how to top-up, safe and appropriate techniques for serving champagne and sparkling wines.

- Types and characteristics of beers and ciders and how they are served:
  - types of beer – bottled, keg and cask ales, beer, stout, lager, dry, sweet, strong, pale, amber-coloured, dark, light, brown, ordinary, best bitter, heavily hopped, all-malt, low-alcoholic, non-alcoholic
  - main types of cider – draught, keg/bottled, medium sweet, medium dry, special
  - beer/cider/lager dispenser – cask hand pulled, keg electric pump, bottled
  - faults that can occur with beer and ciders – cloudy, flat, sour, incorrect temperature.
- Types of spirits and liqueurs:
  - spirits – brandy, gin, rum, tequila, vodka, whisky
  - liqueurs – advocaat, amaretto, different crèmes (cassis, cacao, menthe, mûre), schnapps, sloe gin, whisky, coffee, herbal, fruit
  - service of spirits and liqueurs – with cream, with mixers, with cordials, with ice, frappé, with salt, with fruit.
- Types of cocktails and how they are made:
  - alcoholic and non-alcoholic
  - base ingredients – spirit-based, cream-based, champagne-based, fruit-based
  - different methods for mixing of cocktails – shaken/mixed, stirred, blended, muddled/churned, built, layered/poured.
- Types of non-alcoholic beverages:
  - soft beverages, bottled water (sparkling, still), carbonated, juices (fruit, vegetable), squashes, milkshakes, smoothies, speciality and blended teas, chocolate
  - types of coffee – Americano, cappuccino, espresso, latte, flat white, iced, instant, filter, cafetière.

Recognition, selection and purpose of appropriate equipment, condiments, accompaniments and ingredients.

- Equipment needed for beverage service:
  - glassware and the appropriate beverage – Paris goblet, flute/tulip, small-size, medium-size, large-size, 50 ml, 125 ml, 175 ml, half-pint and pint tankards, pint tumblers, tumblers, short-stemmed beer glass, lager glass, wine goblets, sherry/port, liqueur, balloon, cocktail, saucer, highball, sour glass, martini cocktail glass, slim jim, elgin
  - beverages – jugs, pitchers, carafes, crockery, cutlery, trays, juice dispensers, coffee machines, hot water pots, coffee pots, teapots, sugar bowls, tea strainers, teaspoons and sugar tongs, salvers, trays, service cloths/linen, corkscrew/bottle opener, ice, ice bucket/stands, chillers/coolers, blenders, shakers/mixers, pourers, stirrers, squeezers/strainers/chopping board and knife, pitchers, ice scoops, cocktail list menu, optic measures, 25 ml and 50 ml measures, short- and long-stem drinking straws, teaspoon, soda siphon
  - service supplies – menus/promotional items, napkins, table coverings, coasters, beverages containers, decorative items and stirrers.
- Condiments, accompaniments and ingredients needed for different types of beverage service:
  - ice, sugars/sweeteners, milk, cream, food garnishes (lemon, orange, lime, olives), decorative items/stirrers, salt/sugar, fruit, fruit juices/soft drinks/mixers, alcohol, syrup, salt, bitters, Worcestershire sauce, Angostura bitters, peach bitters, cocktail cherries, olives.

## C How the hospitality industry supports the needs and expectations of food and beverage customers

### C1 Knowledge and understanding of the menu to meet and exceed customers' needs and expectations

The products and the level of service required to meet and exceed customer needs and expectations, and how compliance with current legislation and the ability to describe food dishes and beverages and recommend accompanying beverages may contribute to doing so.

- Knowledge of dishes on the menu and their availability, ingredients, presentation/service methods and traditional accompaniments, and the degree of flexibility available:
  - dish composition and ingredients – those that may trigger allergies, country or area of origin of produce, organic, free range, fair trade, animal welfare
  - specialities of the day, week, season
  - increased flexibility – lighter alternatives, smaller portions, whether dishes may be amended on request
  - children's dishes that are available – different menu or adapted and smaller portions of main dishes
  - unavailability of dishes and other items and the appropriate procedure to follow
  - how dishes are served
  - traditional sauces, accompaniments and condiments for different menu items
  - presentation of different dishes.
- Knowledge of beverages on the menus/lists and their availability, presentation and service methods and accompaniments:
  - promoted beverages of the day, week, season
  - unavailability of beverages and the appropriate procedure to follow.
- Main food groups, the nutritional composition of dishes and healthier alternatives in food choices:
  - the Eatwell Guide – fruit and vegetables, beans, pulses, fish, eggs, meat and other proteins, dairy and alternatives, potatoes, bread, rice, pasta and other starchy carbohydrates, oils and spreads
  - calorific content of dishes
  - healthier alternatives – wholefoods, fresh foods, healthier cooking methods, including low-fat/low-salt, lighter alternatives, smaller portions.

### C2 Effective preparation, maintenance and clearing of customer service areas

Understand the importance of efficient preparation, maintenance, clearing and cleaning of appropriate equipment, condiments, accompaniments and ingredients in ensuring an effective food and beverage service.

- To include:
  - service equipment that is clean, undamaged and placed ready for customers
  - customer areas that are clean, undamaged and set up appropriately – health and safety considerations, checking for cleanliness, checking furnishing and equipment, obtaining and preparing equipment, determining layout of the environment, the reception, bar area, tables and eating area
  - menus and promotional items that are clean, correct, current and ready for customers' use.

- Maintenance of the customer areas – keeping areas tidy, free from rubbish and food debris, maintenance of a constant stock of service and food items and appropriate condiments and accompaniments.
- Clearance and cleaning of the customer areas – service items, food items, condiments and accompaniments are assembled for cleaning or reusable items are stored appropriately and hygienically, appropriate disposal of rubbish and waste food, service equipment is clean, turned off and stored away correctly, service area is clean and ready for the continuing service, customer areas and furniture are clean, tidy and ready for continuing service, clearing of trays and trolleys from rooms and corridors.
- Level of service skills that meet the business/brand standard.
- Etiquette in sequencing of serving and clearing of food and beverages.

### **C3 Opportunities to recommend, promote and up-sell that will contribute to meeting and exceeding customers' needs and expectations**

The ways in which food and beverage staff are able to contribute to the profitability of the business at the same time as meeting and exceeding customers' needs and expectations.

- Personal selling or positive selling:
  - informative and appealing descriptions of food, wines, and beverages on offer
  - matching of products and services to customers' needs and expectations
  - promotion of specific items or deals, promoting sales, promoting the sale of additional items, providing a competent service and seeking customers' views on the acceptability of food, beverages and service
  - importance of staff briefing and training and the consequences of this not being done effectively
  - recommendation of beverages to accompany food:
    - aperitifs consumed before the meal
    - food considerations – acidic, creamy, simple foods (grills, roasts), delicate, lightly flavoured, robust, flavoursome, sweet, savoury, salty foods
    - matching flavoursome food with full-bodied wines
    - matching lighter food flavours with delicate wines
    - matching food sauces to wines
    - national dishes with wines of that country
    - starters with dry white or dry rosé wines
    - fish and shellfish with chilled dry white wines
    - red meats with red wine
    - white meats with medium white wines
    - game dishes with full-bodied red wines
    - sweets, desserts and fruit with chilled sweet wines
    - cheese with port, dry full-bodied red wines or sweet wines
    - coffee with digestifs (spirits and liqueurs).

### **C4 Legislation, regulations and business procedures**

The importance of complying with legislative and regulatory service requirements and business procedures when delivering a food and beverage service.

- Duty to care for all staff and lawful visitors – due diligence to demonstrate that steps have been taken to ensure good food and beverage hygiene.
- Health and safety requirements – health, safety, environmental, food and beverage hygiene, security and wellbeing of staff and customers, emergency exits, equipment and drills, evacuation procedures.

## UNIT 2: FOOD AND BEVERAGE SERVICE PRINCIPLES

- o current licensing law:
  - objectives – prevention of crime and disorder, public safety, prevention of public nuisance, protection of children from harm
  - reasons for refusal of service of alcohol
  - legal measures
  - permitted hours
  - misuse of drugs
  - smoke-free regulations
  - legal aspects of the sale of goods
  - selling goods by weights and measures
  - provision of services
  - contracts
  - customer property and customer debt
  - avoiding discrimination
  - data protection.

### Grade descriptors

To achieve a grade learners are expected to demonstrate these attributes across the essential content of the unit. The principle of best fit will apply in awarding grades.

#### Level 2 Pass

Learners will be able to demonstrate knowledge and understanding of styles of food and beverage service and a range of services and products and apply this to customer needs and expectations. They will be able to identify and describe the factors involved in the meal experience and relate skill levels, satisfaction, service and environment to customer needs and expectations in a variety of hospitality businesses. They will be able to demonstrate knowledge and understanding of how hospitality businesses use legislation, regulations and business procedures to provide consistent and reliable products and services when delivering a food and beverage service.

#### Level 2 Distinction

Learners will be able to demonstrate a thorough knowledge and understanding of styles of food and beverage service and a range of services and products. Learners will be able to provide detailed explanations of the factors involved in the meal experience. They will be able to interpret information concerning the skill levels, satisfaction, service and environment to customer needs and expectations in a variety of hospitality businesses and how these impact on customer satisfaction. They will be able to analyse and evaluate the effectiveness of the food and beverage service being offered in a variety of hospitality businesses. They will make reasoned judgements and recommendations as to how the food and beverage service may be improved. They will make connections with key food and beverage service concepts and the use of legislation, regulations and business procedures.

### Key words typically used in assessment

The following table shows the key words that will be used consistently by Pearson in our assessments to ensure learners are rewarded for demonstrating the necessary skills.

Please note: the list below will not necessarily be used in every paper/session and is provided for guidance only.

Command or term	Definition
Analyse	Learners present the outcome of methodical and detailed examination: <ul style="list-style-type: none"> <li>• either by breaking down a theme, topic or situation in order to interpret and study the interrelationships between the parts and/or</li> <li>• of information or data to interpret and study key trends and interrelationships.</li> </ul> For example, 'Analyse the reason...'.
Apply	Learners put knowledge, understanding or skills into action in a particular context. For example, 'Apply concepts...'.
Classify	Learners arrange a group of items in classes or categories according to shared qualities or characteristics. For example, 'Classify information...'.

Command or term	Definition
Compare	Learners identify the main factors relating to two or more items/situations or aspects of a subject that is extended to explain the similarities, differences, advantages and disadvantages. For example, 'Compare procedures...'
Describe	Learners give a clear, objective account in their own words, showing recall and, in some cases application, of the relevant features and information about a subject. For example, 'Describe one characteristic...'
Discuss	Learners consider different aspects of a topic, how they interrelate and the extent to which they are important. For example, 'Discuss the work...'
Evaluate	Learners draw on varied information, themes or concepts to consider aspects such as: strengths or weaknesses, advantages or disadvantages, alternative actions, relevance or significance. Learners' enquiries should lead to a supported judgement, showing relationship to its context. This will often be in a conclusion. For example, 'Evaluate two ways in which...'
Explain	Learners show clear details and give reasons and/or evidence to support an opinion, view or argument. They could show how conclusions are drawn (arrived at). Learners show that they comprehend the origins, functions and objectives of a subject, and its suitability for purpose. For example, 'Explain one way in which...'
Give	Learners state or put forward information or argument. For example, 'Give one example...'
Identify	Learners indicate the main features or purpose of something, and/or are able to discern and understand facts or qualities. For example, 'Identify two products...'
List	Learners give a number of connected items or names consecutively. For example, 'List two products...'
Match	Learners suitably associate a pair. For example, 'Match each...'
Name	Learners identify a class or category of things, either uniquely or within a given context. For example, 'Name one...'

Command or term	Definition
Select	Learners choose the best or most suitable option. For example, 'Select an appropriate...'
State	Learners express something definitely or clearly. For example, 'State two organisations...'
Which	Learners specify one or more items from a definite set. For example, 'Which of these types of...'

### Links to other units

This unit links to:

- Unit 1: Working in the Hospitality Industry
- Unit 3: Enhancing the Customer Experience
- Unit 4: Food Service Skills
- Unit 5: Hot and Cold Beverage Service Skills
- Unit 6: Handling Payments and Maintaining a Payment Point
- Unit 7: Running a Hospitality Event.

### Employer involvement

This unit would benefit from employer involvement in the form of lectures by food and drinks connoisseurs on types of food and beverages, equipment used, and food and beverage legislation.

## Unit 3: Enhancing the Customer Experience

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **30**

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### Unit in brief

Learners develop the skills required to meet and exceed customer needs and expectations, and handle potential customer service problems in the hospitality industry.

### Unit introduction

Customer service is at the heart of all successful business transactions. The hospitality industry relies on excellent customer service to satisfy customers' needs. Workers in the hospitality industry are expected to recognise customer profiles, with their different requirements, as well as to use clear communication to create a good rapport with customers in order to explore those needs.

In this unit, you will provide excellent customer service in the hospitality industry. You will develop your product and service knowledge, as well as skills in taking a positive approach to deliver excellent customer service. You will present yourself in a professional manner, use your initiative, confidence, communication skills and behaviours to provide customer service, effectively handling any problems that might arise and dealing with customer feedback to support the improvement of products and services.

This unit will give you the knowledge, personal and vocational skills, and behaviours to progress towards service-based roles such as front-of-house specialist or food and beverage service in a restaurant, hotel, hospitality event organisation or on cruise liners.

### Learning aims

In this unit you will:

- A** Demonstrate customer service skills to meet needs and expectations in a hospitality situation
- B** Demonstrate skills to effectively resolve customer service problems.

**Unit summary**

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<p><b>A</b> Demonstrate customer service skills to meet needs and expectations in a hospitality situation</p>	<p><b>A1</b> Meeting and exceeding the needs and expectations of different customer types</p> <p><b>A2</b> Demonstrating customer service skills</p> <p><b>A3</b> Hospitality situations</p>	<p>Photographic/video evidence of learners providing customer service in a hospitality situation and resolving a customer service problem, which can be supported by observation records.</p>
<p><b>B</b> Demonstrate skills to effectively resolve customer service problems</p>	<p><b>B1</b> Identifying customer service problems</p> <p><b>B2</b> Selecting the best solution to resolve customer service problems</p> <p><b>B3</b> Taking action to resolve customer service problems</p>	
<p><b>Key teaching areas in this unit include:</b></p>		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> <li>• Customer service</li> <li>• Identifying and solving customer problems</li> </ul>	<ul style="list-style-type: none"> <li>• Customer types, needs and expectations</li> </ul>	<ul style="list-style-type: none"> <li>• Communication</li> <li>• Problem solving</li> <li>• Self-management and development</li> </ul>

## Unit content

### Knowledge and sector skills

#### Learning aim A: Demonstrate customer service skills to meet needs and expectations in a hospitality situation

##### A1 Meeting and exceeding the needs and expectations of different customer types

- Customer types, e.g. internal, external, colleagues, supervisors, existing, new, individuals, groups, families, couples, business people, different age groups, different cultures/ethnicity, those with special requirements.
- Customer needs, e.g. accurate information, health, safety and security, assistance, advice, products and services, specific needs.
- Customer expectations, e.g. value for money, special offers, luxury.
- Meeting expectations, including level of products, level and efficiency of service.
- Exceeding expectations, including over and above what is expected, pre-empting needs, e.g. offering discounts, offering additional products or services.
- Type of hospitality industry businesses, e.g. hotels, restaurants, pubs, bars and nightclubs, contract food service providers, hospitality services, membership clubs, events.

##### A2 Demonstrating customer service skills

- Communication skills, to include:
  - formal, e.g. handling complaints, following standard procedures
  - informal, e.g. using non-standard communication channels, networking
  - written, e.g. emails, text, complaint forms, information leaflets, social media
  - verbal, e.g. face-to-face communication, telephone calls
  - non-verbal, e.g. body language, personal presentation.
- Applying communication, customer service skills and behaviours appropriate to the situation and customer, to include:
  - verbal skills, e.g. pronunciation, accents, choice of language
  - listening skills, e.g. actively listening, confirming understanding
  - producing written documentation, all of which must be legible, have correct spelling and grammar, be accurate and fully complete, e.g. booking forms, receipts, complaint reports
  - non-verbal, e.g. positive body language
  - providing up-to-date and accurate information on products and services
  - time management
  - being welcoming and approachable
  - recognising and responding appropriately to different customer needs.
- Skills and techniques needed to sell a product or a service, such as:
  - establishing a rapport
  - identifying needs
  - matching products and services to customer needs
  - other techniques, e.g. closing the sale, switch selling, features and benefits
  - promoting the unique selling points (USPs) of the business, special offers available and promotions to customers
  - checking that customers are satisfied with products and services and acting on feedback in line with business procedures.

**A3 Hospitality situations**

- Face to face, written, telephone.
- Complaints, e.g. wrong product provided, wrong service booked.
- Selling, e.g. an afternoon tea in a tea shop, a takeaway order over the telephone.
- Providing advice, e.g. in a coffee shop about the ingredients in a cake.
- Dealing with problems, e.g. accident involving a child at a wedding, no booking for a large group at a restaurant.

**Learning aim B: Demonstrate skills to effectively resolve customer service problems****B1 Identifying customer service problems**

- Listening carefully to customers about any problem they have raised.
- Asking customers about the problem to check own understanding.
- Recognising repeated problems and alerting the appropriate authority.
- Sharing customer feedback with others to identify potential problems before they happen again in the future.
- Identifying problems with systems and procedures before they begin to affect customers.

**B2 Selecting the best solution to resolve customer service problems**

- Identifying the options for resolving a customer service problem in line with business procedures.
- Working with others to identify and confirm the options to resolve a customer service problem in line with business procedures.
- Finding out the advantages and disadvantages of each option for customer and business.
- Discussing the best option(s) with customer and business.
- Negotiating techniques to resolve customer problems, including replacement, compensation, reduction of cost, referral to a higher authority.
- Finding out for customer other ways that problems may be resolved if unable to help.

**B3 Taking action to resolve customer service problems**

- Discussing and agreeing the options for solving the problem with customer.
- Implementing the option agreed with customer.
- Working with others and customer to ensure that any promises related to solving the problem are kept.
- Keeping customer fully informed about what is happening to resolve the problem.

**Transferable skills****Communication**

- Using communication skills and behaviours to enhance the customer experience.

**Problem solving**

- Using strategies to problem solve in order to satisfy customers.

**Self-management and development**

- Managing use of language and body language when providing customer service.

**Assessment criteria**

Pass	Merit	Distinction
<b>Learning aim A: Demonstrate customer service skills to meet needs and expectations in a hospitality situation</b>		
<p><b>A.P1</b> Demonstrate appropriate customer service communication skills satisfactorily when providing service to meet customers' needs and expectations.</p>	<p><b>A.M1</b> Demonstrate competent use of customer service skills when providing service to meet customers' needs and expectations.</p>	<p><b>A.D1</b> Demonstrate consistent, confident and flexible use of customer service skills to effectively meet customers' needs and expectations.</p>
<p><b>A.P2</b> Demonstrate appropriate customer service behaviours satisfactorily when providing service to meet customers' needs and expectations.</p>		
<b>Learning aim B: Demonstrate skills to effectively resolve customer service problems</b>		
<p><b>B.P3</b> Demonstrate appropriate customer service problem-solving skills in identifying problems to meet customer needs to a satisfactory standard.</p>	<p><b>B.M2</b> Demonstrate competent use of customer service problem-solving skills to efficiently meet customer needs.</p>	<p><b>B.D2</b> Demonstrate confident and consistent problem-solving skills, taking full responsibility to fully meet customer needs.</p>
<p><b>B.P4</b> Demonstrate appropriate customer service problem-solving skills to meet customer needs to a satisfactory standard.</p>		

## Essential information for assessment decisions

Learners must provide customer service in two different hospitality situations. The first situation must include a face-to-face, telephone or written situation and the second must cover resolving a customer service problem.

### Learning aims A and B

**For distinction standard**, learners will:

- demonstrate self-assured and excellent communication skills and behaviours, making customers feel valued through active listening, consistent confirmation of meaning using open and closed questions, taking accurate orders, and appropriately closing the conversation
- be immaculately presented, approachable, confident, polite and enthusiastic at all times
- demonstrate awareness of time when working under pressure, from order to delivery of products/services
- work well under pressure and demonstrate a flexible approach in everything they do
- adapt to the situation as it presents itself, e.g. the change of an order
- use their initiative in recognising and dealing with customer needs by offering alternative products/services if the first choice is not available
- promote special offers expertly by consistently using persuasive language and demonstrating thorough product/service knowledge
- identify and independently solve customer problems by using their negotiating techniques and problem-solving skills, offering solutions to problems presented until the customer is thoroughly satisfied.

**For merit standard**, learners will:

- use most of the relevant communication skills and behaviours appropriately to meet most of the actual and perceived customer needs and expectations. Learners will make customers feel valued but they may not be consistent in confirming meaning, which may lead to an error in the order
- be well presented, polite, enthusiastic and approachable, but may show some insecurity on a few occasions
- close the conversation appropriately, but maybe too quickly on some occasions
- deal with customer needs if they are prompted to do so by the customers, offering alternative products/services and giving some detail on the products/services offered, e.g. pricing
- promote special offers, using most of their persuasive language skills and demonstrating some product/service knowledge, but may not be able to give depth to the detail of the products/services on offer, e.g. they may not be able to describe the cooking methods and ingredients on some of the dishes on offer
- solve customer service problems by using most of their negotiating techniques and problem-solving skills, offering more than one solution to problems presented. They will apply most of their problem-solving skills before escalating problems to a higher authority.

**For pass standard**, learners will:

- use limited but appropriate communication skills and behaviours when responding to customer needs. They may lack confidence in approaching and questioning customers for confirmation of orders and in closing the conversation, e.g. they may close the conversation too quickly
- be acceptably presented but may have an unacceptable item in their uniform, e.g. incorrect footwear

### UNIT 3: ENHANCING THE CUSTOMER EXPERIENCE

- not show awareness of customer needs or have the product/service knowledge to meet those needs
- use limited persuasive language skills and product/service knowledge when promoting special offers
- recognise and attempt to resolve a customer service problem presented by using limited negotiation techniques, but may not effectively take into account all the problem-solving skills required. They may escalate the problem too quickly after one attempt of trying to resolve it.

## Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

### Suggested scenario

You are working in the hospitality industry as a food and beverage server. You need to develop your skills to demonstrate customer service in a face-to-face situation and to resolve a customer service problem in line with business procedures. You will be observed demonstrating your skills to meet given requirements and specifications when serving the customer and resolving the customer service problem. This will be supported by a statement on the suitability of your skills and behaviours in meeting the given requirements and specifications in terms of, for example, communication, customer service skills and behaviours, skills and techniques to sell a product or service. When demonstrating your skills, your performance will be observed by either your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.**

On another occasion, the tutor asks you to provide customer service over the telephone, as well as resolve a customer service problem at the centre restaurant. You will be observed demonstrating your skills to meet given requirements and specifications. Your performance will be observed by your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**The customer service situations for the retake assessment activity must be different from the situation for the first assessment activity.**

## Further information for tutors and assessors

### Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

#### **Introduction to unit**

Tutor-led discussion on the factors to consider when providing quality customer service in the hospitality industry and the quality requirements of customer service to enhance the customer experience.

Learners undertake group discussion and complete worksheets to match the factors in different hospitality situations, the quality outcomes and the potential impact on the business and customer satisfaction.

A visit to a hospitality business would be a useful introduction for learners to customer service practices in hospitality and would allow them to ask questions.

Learners could use their visit to a hospitality business to see first-hand the delivery of excellent customer service in line with business procedures and potentially the successful resolution of a customer service problem.

**Suggested time:** about 4 hours.

#### **Activity: How to meet customer needs**

In groups, learners mind-map customer needs and tastes and share with the class. Tutors guide them to divide these into characteristics, needs and expectations of customers, with examples for each. In their groups, learners make posters with the divisions and examples and present them to the class.

**Suggested time:** about 4 hours.

#### **Activity: How to plan customer service**

Tutor-led discussion about planning to provide effective customer service in business procedures and practices, including dealing with customer problems.

In groups, learners plan and undertake a tutor-led customer service activity with their peers and discuss the outcomes. This session could be captured on video and reviewed by other groups.

**Suggested time:** about 4 hours.

#### **Activity: How to develop customer service communication skills**

Tutor-led discussion on customer service communication skills. In groups, learners could find footage of good and bad customer service communication skills where they identify what should be used and what should not be used and present this to the class, commenting on good and bad customer service communication skills. In pairs, learners practise communication skills by promoting specials on the daily menu. Tutors summarise this in a plenary session.

**Suggested time:** about 4 hours.

**Activity: How to develop customer service skills and behaviours**

Tutor-led discussion around customer service skills and behaviours. Footage of good and bad customer service skills and behaviours could be shown where learners identify what is good and bad on a pre-prepared worksheet.

Learners plan and undertake group work in customer service in response to a brief or instruction, reviewing their skills, behaviours and what happened. Learners share the information they have gathered, which could be captured on video and shown back to the group to make recommendations for improvement in their own practice and skill development.

Tutor-led discussion about recommending improvements in customer service skills and developing goals, skills and behaviours for different situations.

**Suggested time:** about 4 hours.

**Activity: How to deal with customer problems**

Tutors show footage of staff dealing with customer problems in a hospitality service situation. Learners take notes on a pre-prepared worksheet on good practice when dealing with problems. Tutors facilitate a discussion on good practice when dealing with customer problems.

Tutor-led discussion on negotiation skills. Learners share experiences of problems that they have had or witnessed in hospitality businesses and how they were dealt with.

In pairs, learners take part in role-play scenarios where the customer is not happy with their order. Learners practise working with others to identify and confirm the options to resolve a customer service problem in line with business procedures.

**Suggested time:** about 4 hours.

**Activity: How to deal with different customer types**

Tutors divide learners into pairs, giving each pair different customer types, e.g. group, different ethnicity, special requirements. Learners prepare a role play as the customer. In their pairs, learners take it in turns to move to different tables to role-play their particular customer type until all learners have experience of and have dealt with all customer types.

Tutors summarise customer types with the group in a plenary session.

**Suggested time:** about 6 hours.

**Links to other units**

This unit has strong links to:

- Unit 1: Working in the Hospitality Industry
- Unit 2: Food and Beverage Service Principles
- Unit 4: Food Service Skills
- Unit 5: Hot and Cold Beverage Service Skills
- Unit 6: Handling Payments and Maintaining a Payment Point
- Unit 7: Running a Hospitality Event.

**Employer involvement**

This unit would benefit from employer involvement in the form of:

- structured work experience in a food and beverage business, where learners develop customer service skills and knowledge
- co-delivery of the unit by a hospitality industry expert on how to effectively resolve customer problems in a hospitality food and beverage service context.

## Unit 4: Food Service Skills

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

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### Unit in brief

Learners develop the skills needed to set up, prepare and maintain service areas and equipment for serving food using different styles of food service, and safe and hygienic working practices.

### Unit introduction

Food service skills are key to working in the hospitality industry. Interacting with and providing information to customers on the food available is a vital part of the work of food servers. Each day you will be taking into account customers' needs when preparing for service to create a welcoming environment, ensuring that all the necessary service items and equipment are available.

In this unit, you will develop a variety of food service skills that include setting, preparing and clearing service areas safely and hygienically, meeting and greeting customers, taking orders and serving food. You will explore different food service styles, such as table service and silver service. You will learn how to prepare and maintain the food service area and serve food to meet customer expectations of the different styles of service in various hospitality businesses.

This unit will give you the knowledge, personal and vocational skills, and behaviours to progress towards service-based roles such as front-of-house specialist or food service in a restaurant, hotel, hospitality event organisation or on cruise liners.

### Learning aims

In this unit you will:

- A** Prepare service areas and equipment safely and hygienically for food service
- B** Provide food service to customers safely and hygienically.

**Unit summary**

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<p><b>A</b> Prepare service areas and equipment safely and hygienically for food service</p>	<p><b>A1</b> Safe and hygienic practices when preparing food service areas</p> <p><b>A2</b> Preparing for food service</p>	<p>Photographic/video evidence of learners serving food to customers using different service styles, which can be supported by observation records.</p>
<p><b>B</b> Provide food service to customers safely and hygienically</p>	<p><b>B1</b> Food service styles and food types</p> <p><b>B2</b> Greeting customers and taking customer orders</p> <p><b>B3</b> Serving customers' orders and maintaining the service area</p>	
<p><b>Key teaching areas in this unit include:</b></p>		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> <li>• Preparing the service area</li> <li>• Using correct equipment</li> <li>• Using correct service skills</li> </ul>	<ul style="list-style-type: none"> <li>• Health, safety and hygiene</li> </ul>	<ul style="list-style-type: none"> <li>• Preparing for work</li> <li>• Developing practical and technical skills</li> <li>• Managing information</li> </ul>

## Unit content

### Knowledge and sector skills

#### Learning aim A: Prepare service areas and equipment safely and hygienically for food service

##### A1 Safe and hygienic practices when preparing food service areas

- Professional practices, including behaviour and attitude, communication skills, teamwork, complying with codes of practice, personal presentation (personal hygiene, appearance, uniform).
- Safety and hygiene considerations, including:
  - general safety, e.g. opening and closing doors safely, carrying trays, dealing with spillages and breakages appropriately
  - hand hygiene – washing hands at appropriate times
  - handling food safely during service
  - hazard spotting, e.g. spillages on the floor, trip hazards, carrying heavy equipment
  - safe storage of items, e.g. equipment, crockery, cutlery, glassware
  - maintaining a clean work area using hygienic working practices
  - complying with food hygiene regulations.

##### A2 Preparing for food service

- Hospitality industry businesses providing food service, e.g. hotels, restaurants, pubs, bars and nightclubs, contract food service providers, hospitality services, membership clubs, events.
- Preparing the food service area, including:
  - cleaning and organising service areas, laying tables
  - reporting any problems identified, e.g. with food, service equipment.
- Preparing the service area using the appropriate type of service equipment for the food to be served, including:
  - service units, e.g. heated, refrigerated
  - trays
  - crockery
  - cutlery
  - glasses, e.g. water, wine, champagne
  - table coverings, e.g. linen, disposable items, table mats
  - menus, e.g. booklet, card, blackboard
  - service utensils, e.g. tongs, serving spoons
  - condiments, e.g. sugars, sweeteners, cruets, sauces, dressings.

## **Learning aim B: Provide food service to customers safely and hygienically**

### **B1 Food service styles and food types**

- Styles of food service, e.g. plate service, platter service, table service, family-style service, silver service.
- Service concepts, e.g. buffets, counter, cafeteria, self-service.
- Food types, e.g. canapés and other appetisers/starters, soups, egg dishes, pasta and rice dishes, vegetarian dishes, fish, meats, poultry, game, vegetables, salads and dressings, accompaniments, sauces, cold buffet, cheese, sweets, savoury, dessert fruit.

### **B2 Greeting customers and taking customer orders**

- Welcoming customers, checking any booking history and identifying their requirements.
- Providing information on menu items.
- Maximising the order using appropriate sales techniques.
- Passing and receiving orders.
- Serving customers in a timely manner.
- Communicating effectively with customers and colleagues.
- Effective teamwork.
- Dealing with special requirements and requests, e.g. allergies, religious requirements, disability requests, young children.
- Dealing with customers' departures.

### **B3 Serving customers' orders and maintaining the service area**

- Serving food with appropriate service equipment and service style at the appropriate times.
- Complying with legal requirements for temperatures of food for service and storage.
- Ensuring condiments and accompaniments for served food are available for customers.
- Maintaining appropriate stock levels of food and service equipment.
- Maintaining cleanliness of food service area throughout service.
- Clearing work areas, including customer and service areas.
- Ensuring customer payment.

## **Transferable skills**

### **Preparing for work**

- Undertaking food serving activities using different service styles.

### **Developing practical and technical skills**

- Demonstrating safe and hygienic food service skills by preparing the food service area, equipment, serving customers and clearing down.

### **Managing information**

- Using menu items to describe ingredients, pricing and cooking methods of food.

**Assessment criteria**

Pass	Merit	Distinction
<b>Learning aim A: Prepare service areas and equipment safely and hygienically for food service</b>		
<b>A.P1</b> Select appropriate equipment for different food service styles, considering safe and hygienic working practices.	<b>A.M1</b> Demonstrate safe and hygienic preparation of service areas by competently selecting and placing equipment to meet different food service styles.	<b>A.D1</b> Demonstrate preparation of service areas by confidently and consistently selecting and placing equipment that fully meets the requirements of different service styles, showing control over safety and hygiene.
<b>A.P2</b> Demonstrate the safe and hygienic placement of equipment in the service area to a satisfactory standard for the given food service style.		
<b>Learning aim B: Provide food service to customers safely and hygienically</b>		
<b>B.P3</b> Demonstrate satisfactory food service skills when greeting and taking customer orders to adequately meet the requirements and techniques of different food service styles.	<b>B.M2</b> Demonstrate competent food service skills when greeting and taking customer orders, working effectively as part of a team, prioritising key activities on own initiative and serving food to meet the requirements and techniques of different food service styles.	<b>B.D2</b> Demonstrate confident and flexible food service skills when greeting, taking orders, working consistently and effectively as part of a team, prioritising key activities on own initiative and serving food to effectively meet the requirements and techniques of different food service styles.
<b>B.P4</b> Demonstrate satisfactory teamwork to meet the requirements of different food service styles.		
<b>B.P5</b> Serve food to meet the requirements and techniques of different food service styles to a satisfactory standard.		

## Essential information for assessment decisions

Learners must demonstrate provision of food service, using two different service styles.

### Learning aims A and B

**For distinction standard**, learners will:

- set up the food service area, taking into account all of the food service styles and techniques and giving full consideration to safety and hygiene. They will select all the necessary clean equipment for the given food service style and place it correctly to meet the requirements of that style to an exceptional standard, e.g. for table service laying of tables or counter service ensuring all condiments and equipment are made available
- professionally greet customers and take accurate orders, demonstrating full consideration for promptness of service delivery. They will give detailed, accurate information on pricing, ingredients and cooking methods of food on the menu. They will promote special offers, giving accurate and detailed information. They will clarify the customer orders accurately
- show excellent, safe teamwork skills at all times by not creating confusion or accidents
- serve food and clear down to a high-quality standard, safely and hygienically, fully meeting the requirements and techniques of the food service style.

**For the merit standard**, learners will:

- set up the food service area, taking into account most of the food service styles and techniques, considering safety and hygiene most of the time and selecting most of the necessary equipment, ensuring that it is clean and ready for use. They will place most of the equipment correctly to meet the requirements and techniques of the food service style but may omit some items, e.g. condiments or place some equipment incorrectly
- greet customers and take mostly correct orders. They will demonstrate a prompt service delivery but may have one occasion where time was not fully observed. They will provide information on pricing, ingredients and cooking methods of food on the menu with some error, e.g. they may omit one factor and seek clarity from team members. Learners will promote special offers by providing information but may not give all the details required, e.g. they may omit the pricing or ingredients of the dishes. They may make one error when clarifying orders with customers
- show good teamwork skills most of the time. They may have one occasion where they create confusion when dealing with team members, e.g. not being fully clear on an order
- serve food and clear down, meeting most of the requirements and techniques of the food service style.

**For the pass standard**, learners will:

- experience some difficulty in setting up the food service area and placing equipment to meet the requirements and techniques of the food service style, e.g. they may omit some of the equipment needed or place it incorrectly. They will show limited but adequate consideration of safety and hygiene, e.g. they may drop a tray or they might not ensure all equipment is completely clean
- lack self-assuredness when greeting customers and taking orders. They may not be prompt in their service delivery, giving little or no consideration to time. They may not provide all the information on pricing, ingredients or cooking methods of food on the menu but merely list dishes by reading from the menu. They may not adequately promote special offers but itemise information with no other details and seek clarity from team members. They may make errors when clarifying food orders with the customers

### UNIT 4: FOOD SERVICE SKILLS

- show limited consideration of teamwork skills. They may create some confusion when ordering and have to clarify their orders with the cooking staff, and when receiving food orders from the cooking staff, or they may cause minor accidents, e.g. dropping a tray, bumping into a team member
- serve food and clear down to an acceptable standard in line with the minimum operational requirements and techniques of the food service style.

## Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

### Suggested scenario

You are working in the hospitality industry as a food server. You need to develop your skills to demonstrate food service skills in line with business procedures. You will be observed demonstrating your skills to meet given requirements and specifications when providing food service to customers, using the table service style and the buffet service style. This will be supported by a statement on the suitability of your skills and behaviours in meeting given requirements and specifications in terms of, for example, communication, customer service skills and behaviours, skills and techniques to serve food in the two different styles. When demonstrating your skills, your performance will be observed by either your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.**

On another occasion, the tutor asks you to provide food service to customers in the plate service style and over the counter at the centre restaurant. You will be observed demonstrating your skills to meet given requirements and specifications. Your performance will be observed by your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**The food service styles for the retake assessment activity must be different from those for the first assessment activity.**

## Further information for tutors and assessors

### Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

#### Introduction to unit

Tutor-led discussion on the different food service styles in the hospitality industry. Learners complete activities matching the food service styles with the different hospitality businesses. Learners take a tour of the centre food production areas to identify the correct service style associated with commercial food industry settings. Learners carry out a risk assessment of key food service areas, identifying potential risks and hazards. Tutors discuss the importance of working under pressure and being aware of time when receiving and delivering orders.

**Suggested time:** about 3 hours.

#### Activity: The food service industry

Tutor-led activities on getting to know the hospitality food service industry, identifying and exploring the range of different hospitality businesses that provide a food service delivery. Learners take part in case-study activities on the styles of service, equipment and resource requirements, UK hospitality settings and comparisons of the range of service levels that provide a food service to customers.

**Suggested time:** about 8 hours.

#### Activity: Practical work experience

Learners undertake a practical work experience activity where they are mentored by a suitable employer in a food service setting. This environment could be the centre food production area where learners will be given the opportunity to develop first-hand knowledge and experience of food service styles used in the hospitality industry.

**Suggested time:** about 16 hours.

#### Activity: Case study on providing a food service

Tutor-led group project activity on a range of businesses in the hospitality industry providing a food service. Service styles compared include: banqueting, counter service, bar and silver service, restaurant service styles, and buffet and carvery service. Learners must visit and then research (with tutor assistance) the service styles and deliver each one in a practical setting while being assessed. Video footage could be used to facilitate this. Learners present and demonstrate to the class on their given service style. Peers evaluate their own and team performance, giving feedback to support self and team development. Tutors fill in any gaps in a plenary session.

**Suggested time:** about 10 hours.

#### Activity: How to work in a team

Tutor-led activity on working in teams in the hospitality industry. Learners explore the characteristics of successful teams and identify skills needed to apply to a practical setting of their own. In groups, learners identify the possible interactions between team members. They share their findings with the class. Video footage could be shown of bad teamwork in a hospitality service setting. Learners practise serving skills in different service styles, being mindful of safety and appropriate communication and safety issues.

**Suggested time:** about 8 hours.

## Essential resources

For this unit, learners will need access to:

- a food service area
- appropriate equipment and food to demonstrate different service styles.

## Links to other units

This unit has strong links to:

- Unit 1: Working in the Hospitality Industry
- Unit 2: Food and Beverage Service Principles
- Unit 3: Enhancing the Customer Experience
- Unit 5: Hot and Cold Beverage Service Skills
- Unit 6: Handling Payments and Maintaining a Payment Point
- Unit 7: Running a Hospitality Event.

## Employer involvement

This unit would benefit from employer involvement in the form of:

- a masterclass by food service experts to develop learners' skills in the food service styles
- structured work experience in a food service and beverage business, where learners develop their food service skills.

## Unit 5: Hot and Cold Beverage Service Skills

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **60**

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### Unit in brief

Learners develop the skills needed to prepare and serve hot and cold beverages, using safe and hygienic working practices.

### Unit introduction

The world of hospitality is lively, stimulating, vibrant and rewarding. You will find that there are always customers requiring beverages.

In this unit, you will use skills in setting up, preparing and maintaining service areas for beverages. You will prepare and serve different hot and cold beverages such as coffees, wines, beers and cocktails.

This unit will give you the knowledge, personal and vocational skills, and behaviours to progress towards service-based roles such as beverage server or bartender.

### Learning aims

In this unit you will:

- A** Prepare and serve hot and cold non-alcoholic beverages to customers safely and hygienically
- B** Prepare and serve wine and beers to customers safely and hygienically
- C** Prepare and serve spirits and cocktails to customers safely and hygienically.

Unit summary

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Prepare and serve hot and cold non-alcoholic beverages to customers safely and hygienically	<b>A1</b> Types of hot and cold non-alcoholic beverages <b>A2</b> Preparing hot and cold non-alcoholic beverages <b>A3</b> Serving hot and cold non-alcoholic beverages	Photographic/video evidence of learners providing service of beverages to customers, which can be supported by observation records.
<b>B</b> Prepare and serve wine and beers to customers safely and hygienically	<b>B1</b> Types of wine and beer <b>B2</b> Preparation for a wine and beer service <b>B3</b> Serving wine and beer	
<b>C</b> Prepare and serve spirits and cocktails to customers safely and hygienically	<b>C1</b> Types of spirit beverages and cocktails <b>C2</b> Preparing spirit beverages and cocktails <b>C3</b> Serving spirit beverages and cocktails	
<b>Key teaching areas in this unit include:</b>		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> <li>• Equipment and tools used to prepare hot and cold beverages</li> <li>• Preparing hot and cold beverages</li> <li>• Serving hot and cold beverages</li> </ul>	<ul style="list-style-type: none"> <li>• Varieties of hot and cold beverages</li> <li>• Health and safety legislation</li> </ul>	<ul style="list-style-type: none"> <li>• Communication</li> <li>• Working with others</li> <li>• Problem solving</li> <li>• Self-management and development</li> </ul>

## Unit content

### Knowledge and sector skills

#### Learning aim A: Prepare and serve hot and cold non-alcoholic beverages to customers safely and hygienically

##### A1 Types of hot and cold non-alcoholic beverages

- Hot beverages, e.g. teas, coffees, hot chocolates.
- Hot beverage ingredients and accompaniments.
- Non-alcoholic cold beverages, e.g. fruit juices, cordials.
- Allergens, e.g. lactose intolerance.

##### A2 Preparing hot and cold non-alcoholic beverages

- Safety and hygiene legislation for preparing hot and cold non-alcoholic beverages.
- Preparing hot beverage equipment hygienically, e.g. clean cafetières, crockery, urns.
- Preparing non-alcoholic cold beverage equipment hygienically, e.g. clean glassware, unused paper/plastic cups, clean dispensers.
- Ensuring that there are sufficient ingredients and stock.
- Making hot beverages using the correct equipment, ingredients and mixing techniques safely and hygienically.
- Ensuring that equipment is ready and stocked for self-service.
- Pouring or dispensing hot and cold non-alcoholic beverages correctly, safely and hygienically for bar/counter and table service.

##### A3 Serving hot and cold non-alcoholic beverages

- Timeframes from order to delivery of beverages to be adhered to.
- Ensuring that the beverage temperature is correct for consumption.
- Ensuring that the correct equipment is available.
- Provision of accompaniments, e.g. sugar, hot milk, ice.
- Serving beverages to the customer, e.g. at the bar, at the table using the correct pouring techniques.
- Carrying beverages to customers, e.g. tray holding.
- Refilling cups/glasses or taking further beverage orders.
- Dealing with unexpected situations that may occur when pouring and serving, e.g. breakages, spillage.

#### Learning aim B: Prepare and serve wine and beers to customers safely and hygienically

##### B1 Types of wine and beer

- Wines, e.g. red, white and rosé varieties:
  - serving temperatures of wines
  - wine and food pairing.
- Beers, e.g. ales, lagers, stouts, bitter, available as bottled, canned, draft/tap:
  - serving temperatures of beers.

**B2 Preparation for a wine and beer service**

- Legislation regarding safe and hygienic working practices when providing cold beverage service.
- Legislation regarding the provision of alcoholic beverages.
- Preparing the service area safely and hygienically.
- General safety, e.g. opening and closing doors safely, carrying trays, dealing with spillages and breakages appropriately.
- Types of equipment for wine service, e.g. ice bucket, glassware.
- Types of equipment for beer beverages, e.g. glassware, draft.
- Preparation of beverage equipment hygienically.
- Handling equipment.
- Dangers of mishandling kegs and gas supplies.
- Methods of dealing with wastage.

**B3 Serving wine and beer**

- Timeframes from order to delivery of beverages to be adhered to.
- Ensuring that the beverage temperature is correct for consumption.
- Serving beverages using the correct glassware, e.g. wine glasses, beer glasses.
- Carrying beverages to customers.
- Pouring techniques for beers.
- Pouring techniques for wine and etiquette for pouring wine and beer at a table service.
- Refilling glasses/cups or taking further beverages orders.
- Dealing with unexpected situations that may occur when pouring and serving, e.g. breakages, spillage.

**Learning aim C: Prepare and serve spirits and cocktails to customers safely and hygienically****C1 Types of spirit beverages and cocktails**

- Spirit beverages, e.g. vodka, whisky, gin, brandy, available as bottled, canned or on tap.
- Spirit beverages served with mixers, e.g. cordials, water, soft drinks or alone.
- Serving temperatures of spirit beverages, e.g. adding ice or at room temperature.
- Cocktails, e.g. spirit-based, wine-based or non-alcoholic, and can include other ingredients, e.g. fruit, olives, cream and decorations, e.g. cocktail sticks.

**C2 Preparing spirit beverages and cocktails**

- Legislation regarding the provision of alcoholic beverages.
- Legislation regarding safe and hygienic working practices when preparing beverages and in handling and providing alcoholic beverages.
- Preparing the service area safely and hygienically.
- General safety, e.g. opening and closing doors safely, carrying trays, dealing with spillages and breakages appropriately.
- Types of equipment for spirit beverages, e.g. measures, optic dispensers, glassware.
- Types of equipment for cocktail making, e.g. shakers, strainers, glassware.
- Handling and cleaning equipment.
- Pouring and mixing techniques of spirits and cocktails using the correct ingredients.
- Methods of dealing with wastage.

## UNIT 5: HOT AND COLD BEVERAGE SERVICE SKILLS

### **C3 Serving spirit beverages and cocktails**

- Timeframes from order to delivery of beverages to be adhered to.
- Ensuring that the beverage temperature is correct for consumption.
- Serving beverages using the correct glassware, e.g. spirit or cocktail glasses.
- Carrying beverages to customers, e.g. tray holding for table service.
- Serving beverages to the customer, e.g. at the bar, at the table.
- Dealing with unexpected situations that may occur when pouring and serving, e.g. breakages, spillage.

### **Transferable skills**

#### **Communication**

- Communicating with customers and team members to meet customer beverage needs.

#### **Working with others**

- Taking orders from customers and dealing with problems, as well as passing on orders.

#### **Problem solving**

- Dealing with any issues arising from customers, e.g. complaints.

#### **Self-management and development**

- Ensuring that personal appearance is neat and tidy.

Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Prepare and serve hot and cold non-alcoholic beverages to customers safely and hygienically</b>		
<b>A.P1</b> Show adequate hot non-alcoholic beverage service skills to meet specified requirements.	<b>A.M1</b> Show competent hot and cold non-alcoholic beverage service skills to efficiently meet specified requirements.	<b>A.D1</b> Show consistent and confident hot and cold non-alcoholic beverage service skills to comprehensively meet specified requirements.
<b>A.P2</b> Show adequate cold non-alcoholic beverage service skills to meet specified requirements.		
<b>Learning aim B: Prepare and serve wine and beers to customers safely and hygienically</b>		
<b>B.P3</b> Show adequate wine beverage service skills to meet specified requirements.	<b>B.M2</b> Show competent wine and beer beverage service skills to efficiently meet specified requirements.	<b>B.D2</b> Show consistent and confident wine and beer beverage service skills to comprehensively meet specified requirements.
<b>B.P4</b> Show adequate beer beverage service skills to meet specified requirements.		
<b>Learning aim C: Prepare and serve spirits and cocktails to customers safely and hygienically</b>		
<b>C.P5</b> Show adequate spirit beverage service skills to meet specified requirements.	<b>C.M3</b> Show competent spirit and cocktail beverage service skills to efficiently meet specified requirements.	<b>C.D3</b> Show consistent and confident spirit and cocktail beverage service skills to comprehensively meet specified requirements.
<b>C.P6</b> Show adequate cocktail beverage service skills to meet specified requirements.		

## Essential information for assessment decisions

When alcohol is used as part of the course when delivered to learners who are 16 years old and above, it is essential that centres comply with the requirements of Section 153 of the Licensing Act 2003 and subsequent revisions, [www.legislation.gov.uk/ukpga/2003/17/section/153](http://www.legislation.gov.uk/ukpga/2003/17/section/153)

### Learning aims A, B and C

**For distinction standard**, learners will:

- demonstrate self-sufficient hot and cold beverage service skills to meet specific requirements, showing control over the service requirements and consistently considering health and safety legislation and hygienic working practices when carrying and serving beverages to customers
- provide in-depth details on the ingredients of the beverage and any possible allergens. They will demonstrate that they can differentiate between types of the same beverage and select the correct wines to accompany meals
- always select the correct equipment, ingredients and accompaniments when preparing and serving beverages
- make realistic and appropriate decisions in prioritising activities to meet service-level agreements (SLAs) from order to delivery of beverage.

**For merit standard**, learners will:

- demonstrate proficient hot and cold beverage service skills to meet specific requirements, giving consideration to most of the required health and safety legislation and hygienic working practices when carrying and serving beverages to customers
- give details on the ingredients of the beverage but may not discuss the allergens. They will demonstrate that they can differentiate between types of the same beverage, mostly selecting the correct wines to accompany meals
- select the correct equipment, ingredients and accompaniments when preparing and serving beverages most of the time
- make appropriate decisions in prioritising activities that help to meet the SLAs from order to delivery of beverage.

**For pass standard**, learners will:

- show limited hot and cold beverage service skills when carrying and serving beverages to meet specific requirements, e.g. pouring etiquette, tray holding, and may experience some difficulty in using safe and hygienic practices when preparing beverages
- show limited but appropriate product knowledge of hot and cold beverages when providing information, but may not differentiate between types of the same beverage or select the correct wines to accompany meals
- experience some difficulty in selecting relevant equipment, ingredients and accompaniments for preparing and serving a beverage
- experience some difficulty in prioritising activities that help to meet the SLAs from order to delivery of beverage.

## Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

### Suggested scenario

You are working in the hospitality industry as a server in a restaurant. You will be observed using your beverage service skills when serving customers in the restaurant and preparing beverages by selecting and using the correct equipment and ingredients. You are required to prepare and serve hot and cold non-alcoholic beverages, beers and wines, and spirits and cocktails. When demonstrating your skills, your performance will be observed by either your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.**

You are working in the hospitality industry as bartender. You will be observed demonstrating your preparation of beverages by selecting and using the correct equipment and ingredients, and using your beverage service skills when serving customers in the restaurant. You are required to prepare and serve hot and cold non-alcoholic beverages, beers and wines, and spirits and cocktails. When demonstrating your skills, your performance will be observed by either your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**The beverages used for the retake assessment must be different from those for the first assessment activity.**

## Further information for tutors and assessors

### Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

#### Introduction to unit

Tutors separate the class into six groups and ask each group to research one of the following beverages: different types of tea, coffee, non-alcoholic beverages, alcoholic beers/ales/drafts, spirits, wine/champagne/sparkling wine or cocktails. Learners find out about the varieties, ingredients and accompaniments for their beverage. Groups prepare and deliver a presentation to the class. Tutors fill in gaps where needed.

**Suggested time:** about 8 hours.

#### Activity: Legislation on provision of alcoholic beverages

Tutors separate the class into three groups. Each group researches the expectations relating to one of the alcoholic beverages from the previous activity. The groups prepare a poster, highlighting the pertinent points on legislation regarding the provision of alcoholic beverages. Tutors highlight areas of importance with the groups.

**Suggested time:** about 2 hours.

#### Activity: How to meet customer needs

Groups of six are set up around the classroom, where five learners are customers and one is serving staff. Props such as menus, glassware and bottles should be given to each group. Learners are instructed to approach and take orders from their peers. At the end of the activity, learners who were playing the customers state the strengths and weaknesses of their server. This could then be fed into a plenary session so that all the strengths and weaknesses are highlighted. Footage of different service contexts could be shown and learners asked to identify the strengths and weaknesses and discuss their own experiences. Learners could then repeat the first activity, ensuring that there is improvement in the beverage service.

Tutors ask learners what they know about different wines to accompany different meals by separating the class into two groups. Group 1 is given the task of finding out about different types of red wines to accompany different dishes based on bouquet/taste and which glasses to use, while Group 2 does the same task for white and rosé wines. Groups present to each other. Tutors bring knowledge together by filling in any gaps.

**Suggested time:** about 10 hours.

#### Activity: How to prepare hot beverages

In groups, learners research the types of equipment used for different hot beverages. Tutors ask three learners to demonstrate making coffee, tea and hot chocolate using the correct equipment, and talk through what they are doing. Tutors support them as they are demonstrating their skills. Tutors then ask the class to work in three groups: one for coffee, one for tea and one for hot chocolate. Each group is asked to think about the different equipment and accompaniments to use for each type of beverage. Groups feed back to the class. Tutors demonstrate making different beverages, e.g. variety of coffees, teas and hot chocolates using the correct equipment. In groups, learners practise making varieties of hot beverages, assisting each other. Groups move from station to station to get the opportunity to make the different beverages.

**Suggested time:** about 10 hours.

**Activity: How to provide hot beverage service**

In groups, learners list the equipment and skills needed to carry hot beverages. Tutors demonstrate carrying and safely placing hot beverages for customers on a table and a bar. Discussion of business procedures needed to refill or take further beverages orders. Tutor-led discussion on dealing with customer complaints.

**Suggested time:** about 6 hours.

**Activity: How to prepare cold beverages**

Tutor-led discussions on legislation on safe and hygienic work practices. In groups, learners research the types of equipment used for different cold, non-alcoholic and alcoholic beverages. Tutors divide the class into four groups to prepare to demonstrate the making of different cold beverages. One group to prepare cordials and dispense/pour non-alcoholic soft drinks; one group to pour beer from a bottle and pull a draft; one group to pour wine and champagne; one group, which should be larger, to make three cocktails using the correct equipment. Tutors guide each group as they are preparing. Each group is asked to think about different equipment and accompaniments to use for each type of beverage. In their groups, learners practise making their given beverage, assisting each other. Groups then move from station to station to get the opportunity to make the different beverages.

**Suggested time:** about 14 hours.

**Activity: How to provide cold beverage service**

In groups, learners list the equipment and skills needed to carry cold beverages. Tutors demonstrate carrying and safely placing cold beverages for customers on a table and a bar. In pairs, learners practise the service skills using the correct equipment, with the tutor circulating to guide where necessary.

Tutors demonstrate carrying and serving wine to a customer using the correct equipment and serving style, e.g. taking the cork out/screw top off, serving from the right of the customer, allowing one person on the table to taste before pouring for the rest of the table, placing the bottle in the ice bucket. In pairs, learners practise their skills in serving wine to each other. Tutor-led discussion on dealing with unexpected situations, e.g. violent and disorderly customers. Tutor-led discussion on dealing with customer complaints.

**Suggested time:** about 10 hours.

## UNIT 5: HOT AND COLD BEVERAGE SERVICE SKILLS

### Essential resources

For this unit, learners will need access to:

- crockery and glassware
- trays
- linen.

### Links to other units

This unit has strong links to:

- Unit 1: Working in the Hospitality Industry
- Unit 2: Food and Beverage Service Principles
- Unit 3: Enhancing the Customer Experience
- Unit 4: Food Service Skills
- Unit 6: Handling Payments and Maintaining a Payment Point
- Unit 7: Running a Hospitality Event.

### Employer involvement

This unit would benefit from employer involvement in the form of:

- a masterclass by beverage service experts to develop learners' skills in hot and cold beverage serving
- structured work experience in a beverage business, where learners develop their beverage service skills.



## Unit 6: Handling Payments and Maintaining a Payment Point

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal**

Guided learning hours: **30**

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### Unit in brief

Learners develop the skills needed to handle payments and maintain a payment point, calculate and present a bill to customers using a payment point, and keep payments secure.

### Unit introduction

Managing money is key to running a successful business. Can you spot a mistake in a bill before it is handed to a customer? Being able to provide an accurate bill and take swift payments are important skills for a career in the hospitality industry.

In this unit, you will develop skills in handling money. You will prepare the payment point before the arrival of customers, and use the skills needed to calculate and present a bill, taking the correct payment and giving change. You will also gain skills in how to total all the transactions after all customers have left.

This unit will give you the knowledge, personal and vocational skills, and behaviours to progress towards service-based roles such as food and beverage server or front-of-house staff, and is a requirement if you want to progress to a supervisory role in the hospitality industry.

### Learning aims

In this unit you will:

- A** Set up a payment point to meet business requirements
- B** Handle customer payments securely to meet business requirements
- C** Close down a payment point securely to meet business requirements.

**Unit summary**

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<p><b>A</b> Set up a payment point to meet business requirements</p>	<p><b>A1</b> Checking the payment point equipment at the beginning of a shift to business requirements</p> <p><b>A2</b> Preparing the cash float to business requirements</p>	<p>Photographic/video evidence of learners setting up payment points, securely handling customer payments and closing down payment points, which can be supported by observation records.</p>
<p><b>B</b> Handle customer payments securely to meet business requirements</p>	<p><b>B1</b> Calculating the total bill</p> <p><b>B2</b> Presenting the bill and receiving payment</p> <p><b>B3</b> Business requirements for ensuring security of a payment point</p>	
<p><b>C</b> Close down a payment point securely to meet business requirements</p>	<p><b>C1</b> Calculating, handing over and signing off takings and float</p> <p><b>C2</b> Reasons for and consequences of errors</p> <p><b>C3</b> Reporting discrepancies in line with business requirements</p>	
<p><b>Key teaching areas in this unit include:</b></p>		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> <li>• Preparing and using payment point equipment</li> <li>• Calculation of the float</li> </ul>	<ul style="list-style-type: none"> <li>• Calculating percentages</li> <li>• Security of the payment point</li> </ul>	<ul style="list-style-type: none"> <li>• Communication</li> <li>• Thinking skills/adaptability</li> <li>• Managing information</li> </ul>

## Unit content

### Knowledge and sector skills

#### Learning aim A: Set up a payment point to meet business requirements

##### **A1 Checking the payment point equipment at the beginning of a shift to business requirements**

- Payment point equipment, including cash registers, electronic point of sale (EPOS), cash drawer, smart cards processing, e.g. cash/debit card (chip and pin), contactless payments.
- Following business procedures in using all payment point equipment and accuracy when counting the float.
- Checking that the equipment is in working order and stocked, e.g. cash register rolls, staples, pens.

##### **A2 Preparing the cash float to business requirements**

- Preparing and checking the cash float, a sum of money provided at the start of the day, to ensure there are sufficient coins (£2.00, £1.00, 50p, 20p, 10p, 5p, 2p, 1p) and notes for change (£50, £20, £10, £5) accurately.
- Reporting discrepancies as they arise.

#### Learning aim B: Handle customer payments securely to meet business requirements

##### **B1 Calculating the total bill**

Manually and electronically calculating the total bill, including:

- itemising different products purchased, with prices
- calculating discounts
- calculating value added tax (VAT)
- adding/removing (discretionary) service charge and/or tips or gratuities and disclosure on how these funds are distributed
- finalising the total bill.

##### **B2 Presenting the bill and receiving payment**

- Presenting the bill to customers at the table or payment point in line with the business requirements, e.g. verbally itemising the bill or providing the bill in a wallet for discretion.
- Dealing with any disputes about the bill from the customer.
- Using payment point equipment to take payments from customers in line with business requirements around validating payment methods (debit and credit cards and cash).
- Checking validity dates of debit and credit cards.
- Encouraging customers to keep their data safe, e.g. personal identification numbers (PIN) for credit and debit cards.
- Dealing with issues around payment, e.g. refusal of a card, insufficient cash for payment and explaining business requirements to customers, if necessary.
- Dealing with suspected fraud, e.g. issues with the validation of credit or debit cards, cheque payments, forged notes, adhering to business requirements.
- Entering the payment in the payment point system.
- Handling any tips via cash and via electronic payments.

- Calculating the correct change.
- Providing the customer with a proof of payment.

### **B3 Business requirements for ensuring security of a payment point**

- Following business requirements for ensuring security of the payment point, including authorised access to payment point, e.g. codes and passwords, and ensuring the payment point is locked when not in attendance.

## **Learning aim C: Close down a payment point securely to meet business requirements**

### **C1 Calculating, handing over and signing off takings and float**

- Counting the float at the end of the shift and calculating the balance against the payment point records in a secure venue.
- Sign off the takings, float and potential discrepancies at the end of the shift.
- Handing over the takings of the payment point system to a higher authority.

### **C2 Reasons for and consequences of errors**

- Reasons for errors, e.g. miscalculations, incorrect charges entered, non-completion of appropriate checks:
  - business requirements around errors and miscalculations, e.g. deductions from tips, salaries or a negative statement on the employment record of the employee.
- Consequences of errors, including:
  - implication for the customer, e.g. overcharging
  - security risks, e.g. theft/fraud
  - financial losses for the business.

### **C3 Reporting discrepancies in line with business requirements**

- Identifying and recording differences between takings and cash register readings at the end of the shift, e.g. printing takings versus cash register readings.
- Considering reasons for these differences, e.g. no Z-reading of the payment point before the shift, incorrect charges have been added and deposit of further cash for change have not been factored in.
- Reporting differences between takings and cash register readings at the end of the shift to a higher authority in line with business requirements, e.g. discrepancies over £10 per shift need to be reported.

## **Transferable skills in unit**

### **Communication**

- Retrieving and presenting the bill in a professional manner.

### **Thinking skills/adaptability**

- Explaining items on the bill, discounts and VAT to others.

### **Managing information**

- Matching transactions against business calculations.

Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Set up a payment point to meet business requirements</b>		
<b>A.P1</b> Demonstrate appropriate preparation of the payment point equipment to satisfactorily meet business requirements.	<b>A.M1</b> Demonstrate competent preparation of payment point equipment and cash float to meet business requirements.	<b>A.D1</b> Demonstrate a secure and comprehensive preparation of payment point equipment and cash float to meet business requirements to an excellent standard.
<b>A.P2</b> Demonstrate preparation of the cash float to satisfactorily meet business requirements.		
<b>Learning aim B: Handle customer payments securely to meet business requirements</b>		
<b>B.P3</b> Prepare bills appropriately to meet business requirements.	<b>B.M2</b> Demonstrate competent preparation of bills and use of payment point equipment to securely take payments from customers to meet business requirements.	<b>B.D2</b> Demonstrate accurate and comprehensive preparation of bills and use of payment point equipment to securely take payments from customers to effectively meet business requirements.
<b>B.P4</b> Use payment point equipment adequately to take secure payments from customers to meet business requirements to a satisfactory standard.		
<b>Learning aim C: Close down a payment point securely to meet business requirements</b>		
<b>C.P5</b> Calculate the takings and float adequately and securely before handing over at the end of shift to meet business requirements to a satisfactory standard.	<b>C.M3</b> Calculate takings and float securely, checking for accuracy before handing over, reporting discrepancies and reasons to a higher authority, and following business requirements to a good standard.	<b>C.D3</b> Calculate takings and float securely and accurately before handing over, reporting discrepancies and reasons to a higher authority, and following business requirements to an excellent standard.
<b>C.P6</b> Hand over takings and adequately report discrepancies to a higher authority, following business requirements to a satisfactory standard.		

## Essential information for assessment decisions

### Learning aims A, B and C

**For distinction standard**, learners will:

- prepare a payment point, taking into account all the business requirements for setting up payment point equipment. The cash float does not have errors and learners are comfortable using and stocking all equipment
- prepare the itemised bill accurately, using payment point equipment applications fully, including discounts, VAT and discretionary service charge
- skilfully use equipment to take payments and provide the customer with proof of payment with no errors. They will consistently carry out validation checks of payment methods. They will identify all the issues of suspected fraud and provide the correct change. They will deal with any disputes over the bill by reaching a compromise and recalculating accurately, without referring to a higher authority
- accurately calculate and hand over takings and float to a higher authority. They will ensure security by counting the float of the payment point in a secure venue and will sign off the takings, float and discrepancies, reporting and providing all possible reasons for discrepancies to a higher authority.

**For merit standard**, learners will:

- prepare a payment point, taking into account most of the business requirements for setting up payment point equipment effectively. They may omit to check the operation of a piece of equipment, or restocking it, but are comfortable using equipment. The cash float may have some calculation errors but these are corrected when checking
- prepare the itemised bill but may not accurately calculate discounts, VAT or discretionary service charge, or use the payment point applications fully. They will correct any errors by checking and recalculating the bill
- take payments using payment point equipment. They will experience very little difficulty in operating the equipment. They will provide the customer with proof of payment with no errors, most of the time. They will carry out validation checks of payment methods most of the time. They will identify most of the issues of suspected fraud and provide the correct change most of the time. They will deal with disputes over the bill by attempting to rectify them, but not always accurately or successfully
- calculate and hand over takings and float to a higher authority with minimal calculation errors. They will ensure security by counting the float of the payment point in a secure venue and will sign off the takings, float and discrepancies. They will report discrepancies to a higher authority but may not provide all possible reasons for them.

**For pass standard**, learners will:

- prepare payment point equipment sufficiently but may omit to check the operation or stocking of a piece of equipment, or be unsure of the procedure to use to restock a piece of equipment. The cash float may have some calculation errors that are not checked
- prepare the itemised bill but may not be able to accurately calculate discounts, VAT or discretionary service charge. Learners may not be able to use any of the payment point applications to prepare the bill and they may not check their calculations initially, only when the customer queries it. They may not be able to deal with a dispute over the bill and may pass it over immediately to a higher authority

### UNIT 6: HANDLING PAYMENTS AND MAINTAINING A PAYMENT POINT

- take payments using payment point equipment with some difficulty. They may not carry out the validation checks of payments or may omit to provide the customer with proof of payment. They may not be able to identify the issues of suspected fraud. They may make errors in calculating the correct change. They may not be able to deal with a dispute over the bill and may immediately hand it over to a higher authority
- demonstrate the calculation and handover of takings and float to a higher authority but may do so with calculation errors. They may not follow business requirements in ensuring the security of counting the float of a payment point in a secure venue or may not give reasons for discrepancies to a higher authority. They may omit to sign off the takings, float and potential discrepancies.

## Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

### Suggested scenario

You are working in a restaurant as a food and beverage server. You have been asked by your manager to prepare the payment point equipment and the cash float in readiness for the day. Your manager has given you responsibility for calculating the food and beverage bills using the equipment, taking into account discounts, VAT and discretionary service charges. Your manager has also tasked you with taking payments using the restaurant's payment point equipment, as well as dealing with any disputes that arise on billing while conducting the checks required by the business when dealing with payments. Finally, you need to calculate and hand over the takings and cash float at the end of the day. You will be observed in all the above processes. You will need to keep copies of bills and takings. As part of this assessment, you will also need to highlight any discrepancies in the end-of-day takings and cash float to an authorised manager. When demonstrating your skills, your performance will be observed by either your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.**

You are working in a cafeteria. You have been asked by the cafeteria manager to prepare the payment point equipment and the cash float in readiness for the day. The manager has given you responsibility for calculating the food and beverage bills using the equipment, taking into account, discounts, VAT and discretionary service charges. The cafeteria manager has also tasked you with taking payments using the cafeteria's payment point equipment, as well as dealing with any disputes that arise on billing while conducting the checks required by the business when dealing with payments. Finally, you need to calculate and hand over the takings and cash float at the end of the day. You will be observed in all the above processes. You will need to keep copies of bills and. As part of this assessment, you will also highlight any discrepancies in the end-of-day takings and cash float to an authorised manager. When demonstrating your skills, your performance will be observed by either your tutor, who will take on the role of your supervisor/manager, or an employer from the hospitality industry.

**The cash float amount when setting up the payment point and prices of menu items ordered by customers for bill calculation for the retake assessment must be different from those for the first assessment activity.**

## Further information for tutors and assessors

### Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

#### Introduction to unit

Tutor-led discussion on types of payment point equipment, the procedures in using the equipment and the factors that need to be considered when preparing the cash float to given requirements.

Tutors could encourage learners to talk about bills that they have been presented with at hospitality businesses, and for them to refer to any issues they have had around payment such as receiving the wrong change.

A visit to a hospitality business would be a useful introduction for learners to security of a payment point and would allow them to ask questions about calculating takings and float at the end of a shift, reasons and impact of errors, and reporting of discrepancies.

Learners could use their visit to a hospitality business to see first-hand closing down of a payment point.

**Suggested time:** about 4 hours.

#### Activity: How to set up and use payment point equipment

Learners could be put into groups of four to research a given type of payment point equipment before giving a presentation on this subject to other learners. Groups are asked to set up their researched payment point equipment and practise its use, with the assistance of tutors.

Once the skills of set-up and usage are completed, learners rotate in demonstrating and learning how to set up and use other payment point equipment until all groups have refined their skills.

Learners create a checklist while they use each piece of equipment. The checklist is further refined in the tutor-led plenary.

**Suggested time:** about 6 hours.

#### Activity: How to prepare the cash float

Tutor-led demonstration of preparing the cash float at the beginning of the shift. In pairs, learners count and calculate floats provided by tutors before preparing the payment point equipment with the float. One learner will check and set up the payment point and the other learner will observe their peer and assess their performance against the checklist created in the previous session.

Learners switch roles and repeat the activity, keeping copies of any calculations they have made.

**Suggested time:** about 2 hours.

#### Activity: How to calculate and present the bill

In pairs, learners are given a menu that includes prices and a case study of items ordered by a customer, discounts to be provided and a service charge. They calculate manually and finalise the total bill. Tutors elicit discussion on how errors will impact on the business. Two pairs join up to make groups of four. The pair, in role as servers, present the bill to the other pair, in role as customers and briefed by tutors to dispute the bill. The first pair then reviews/recalculates the bill based on the dispute of the role-playing customer.

**Suggested time:** about 4 hours.

**Activity: How to deal with customer payments**

Tutors discuss business requirements for ensuring security of payment points. In pairs, learners take cash payments and calculate and give change manually. They move to the payment point equipment available, taking payments and providing proof of payment.

Tutors encourage learners to validate payment, e.g. checking for forged banknotes and validity of dates on bank cards. Different scenarios can be given, e.g. fraudulent payment, cards not going through, dealing with service charges in line with the requirements of the business for dealing with payments.

Learners are divided into two teams. Each team discusses potential security breaches and selects a breach to role-play. Each team role-plays their security breach while the other team pays attention and shouts out, 'Stop! Security breach!' when they see it occurring. They get one point for correctly identifying the breach and two points for explaining how to overcome it. Once team one has completed its role play, the teams swap places. Learners develop checklists on security breaches to be on the lookout for when dealing with customer payments. Tutors fill any gaps in a plenary session.

**Suggested time:** about 8 hours.

**Activity: How to hand over and sign off takings and float**

Tutors demonstrate counting up the day's takings and balancing them against the payment point records and the original cash float. In pairs, learners are given a similar activity and must report any differences in outcomes to a higher authority. Tutors elicit discussion on possible reasons for errors and the consequences they have on the customer, staff and the business, and why it is important to sign off the takings and float. In groups of four, learners discuss the security issues that could arise when counting money and are encouraged to practise handing over, fulfilling all business requirements and giving reasons for discrepancies.

As a group, learners write down different amounts that represent discrepancies and the questions that arise from them (Do you need to report this? What could have happened?) when signing over a shift. They write these on bingo cards, ensuring that each card is different by starting on a different number. Learners each pick a bingo card, read the question and provide an answer. All learners that have the number on their card will cross it off. The first learner that has bingo has won.

**Suggested time:** about 6 hours.

## Links to other units

This unit has strong links to:

- Unit 1: Working in the Hospitality Industry
- Unit 2: Food and Beverage Service Principles
- Unit 3: Enhancing the Customer Experience
- Unit 4: Food Service Skills
- Unit 5: Hot and Cold Beverage Service Skills
- Unit 7: Running a Hospitality Event.

## Employer involvement

This unit would benefit from employer involvement in the form of a masterclass by hospitality food and beverage experts to develop learners' skills in preparing and managing a payment point.

## Unit 7: Running a Hospitality Event

Level: **2**

Unit type: **Mandatory**

Assessment type: **Internal Synoptic**

Guided: **60**

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### Unit in brief

Learners develop the skills needed to recognise, meet and exceed customer expectations, and work as part of a team to ensure that customers attending the event feel welcomed and looked after.

### Unit introduction

Events are a large part of the hospitality industry and are wide ranging, including conferences, weddings and banquets. Being involved with events can be exciting, challenging and rewarding. It is essential to anticipate, meet and exceed customers' needs and expectations. Planning and preparation is key to this, as is the successful delivery of the event on the day.

In this unit, you will be planning, organising and reviewing a hospitality event to deliver excellent customer service. You will work with others to run the event, setting common goals and taking into consideration health, safety and hygiene practices to achieve business objectives. You will review the success of the hospitality event and your own personal performance by using feedback collected from those involved in the event, including the team, tutor and customers. You will build on the knowledge and skills developed in *Units 1, 2, 3, 4, 5* and *6* by using what you have learned in a range of contexts.

This unit will give you the knowledge, personal and vocational skills, and behaviours to progress to a service-based role specialising in events services, working in a professional hospitality setting such as a conference centre, restaurant or hotel.

### Learning aims

In this unit you will:

- A** Plan a hospitality event to meet customer requirements
- B** Organise and service a hospitality event to meet customer requirements
- C** Review the success of a hospitality event in meeting customer requirements.

**Unit summary**

Learning aim	Key teaching areas	Summary of suggested assessment evidence
<b>A</b> Plan a hospitality event to meet customer requirements	<b>A1</b> Planning process for hospitality events <b>A2</b> Planning a hospitality event to meet customer requirements	Photographic/video evidence of learners planning, preparing for and running an event, which can be supported by observation records. This needs to be followed by a reflective account on the success of the event and the learner’s own performance at the hospitality event.
<b>B</b> Organise and service a hospitality event to meet customer requirements	<b>B1</b> Organising a hospitality event <b>B2</b> Providing service at a hospitality event	
<b>C</b> Review the success of a hospitality event in meeting customer requirements	<b>C1</b> Reviewing own performance <b>C2</b> Reviewing hospitality team activities	
<b>Key teaching areas in this unit include:</b>		
Sector skills	Knowledge	Transferable skills/behaviours
<ul style="list-style-type: none"> <li>• Planning, organising and prioritising</li> <li>• Budgeting</li> <li>• Diary management</li> <li>• Customer service</li> </ul>	<ul style="list-style-type: none"> <li>• Types of hospitality event</li> <li>• Insurances and licenses</li> <li>• Sustainable event management</li> </ul>	<ul style="list-style-type: none"> <li>• Communication</li> <li>• Working with others</li> <li>• Preparing for work</li> <li>• Thinking skills/adaptability</li> <li>• Developing practical and technical skills</li> </ul>

## Unit content

### Knowledge and sector skills

#### Learning aim A: Plan a hospitality event to meet customer requirements

##### A1 Planning process for hospitality events

- Types of hospitality event, e.g. conferences, weddings, banquets, themed events.
- Purpose of events, e.g. gathering people for a given purpose, raising money for charity.
- Planning process, including:
  - budgeting, e.g. staff, venue, equipment, food and beverages, entertainment, security
  - constraints, e.g. location, space, budget, time, time of the year, participants, health, safety and security
  - setting dates and alternative dates for holding the event
  - choosing and booking the event site, e.g. hotels, convention centres, reception halls
  - getting insurance and licences, e.g. music, alcohol
  - organising transportation and parking
  - taking on roles and responsibilities in the team for organising the event – coordinator, finance, administration, food and beverage service, health and safety
  - sustainable event management – considering environmental, economic and social issues.

##### A2 Planning a hospitality event to meet customer requirements

- Determining the type and purpose of the event, e.g. conference to launch a product.
- Determining customer requirements, e.g. entertainment, location, guest list, hospitality, budget.
- Monitoring a schedule, e.g. meetings with customer and team, timings.
- Setting realistic targets for tasks and activities to be completed to required standards.
- Preparing the event, e.g. staff, entertainment, keeping in contact with customer.
- Organising details, e.g. food, beverages, music, guest list, budget, decorations.
- Contingency planning, e.g. staff, suppliers, alternative site if event is outdoors.
- Reviewing plan against customer requirements.

#### Learning aim B: Organise and service a hospitality event to meet customer requirements

##### B1 Organising a hospitality event

- Using a set of agreed, clear and safe working practices that comply with relevant legislation.
- Managing time for the event, including the length needed for preparation for the event.
- Keeping in contact with senior team members, e.g. the event manager, team leaders.
- Meeting requirements.
- Using a plan.
- Setting up, including signs, rooms and furniture, decorations, food and beverage service areas, glasses, crockery, cutlery, equipment, ensuring correct operation of room equipment, e.g. audio-visual.

**B2 Providing service at a hospitality event**

- Required standards for service during the event, e.g.:
  - welcoming customers/guests, identifying any requirements they have
  - providing information on food and beverage items
  - dealing with customers/guests in a timely manner
  - communicating effectively with customers/guests and team members
  - effective teamwork
  - dealing with special requirements and requests, e.g. allergies, religious requirements, disability requests.
- Appropriate skills and behaviours required for working with team members, including:
  - positive approach/attitude to work
  - accepting instructions willingly
  - correct uniforms and personal hygiene
  - cooperating with other team members
  - offering help and assistance
  - respecting and understanding others
  - showing fairness and consideration to others.
- Clearing up, including:
  - waste disposal, continuous clearing of all customer/guest areas
  - hygienic cleaning of glasses, crockery, cutlery and correct storage
  - disposable and safe storage of surplus food and beverage
  - rooms, including equipment, furniture and decorations.

**Learning aim C: Review the success of a hospitality event in meeting customer requirements****C1 Reviewing own performance**

- Reviewing, e.g. self-analysis, completion of checklist, use of video evidence.
- Strengths and areas for improvement, e.g. skills, techniques, decision making.

**C2 Reviewing hospitality team activities**

- Using review techniques, including:
  - sources of information, e.g. customers/guests, colleagues
  - collecting information, e.g. comments cards, questionnaires, staff debrief
  - analysing information.
- Reviewing effectiveness of event, team activities and own contribution, including:
  - against plan, objectives and budget
  - deviation from plans
  - timings
  - appropriateness of own and team skills and working methods
  - quality and appearance of event and component details, e.g. venue, entertainment, food, beverages
  - attitude and behaviour
  - dealing with special requirements and requests
  - review findings against original customer requirements/brief.
- Recommendations for improvement, e.g. goals (short term and long term), different equipment or technology, where to seek help and advice.

### Transferable skills

#### Communication

- Using communication for different purposes when planning, running and reviewing the hospitality event.

#### Working with others

- Setting common goals, showing respect for others in the team and valuing their contributions, listening to others in the team, being open-minded, taking on roles and responsibilities during the planning, running and reviewing the hospitality event.

#### Preparing for work

- Planning and undertaking hospitality activities, self-review and assessment, awareness of qualities and attributes required for work in the hospitality industry.

#### Thinking skills/adaptability

- Using own initiative, positive attitude and adaptability at the hospitality event.

#### Developing practical and technical skills

- Demonstrating skills/processes and using equipment/resources safely and appropriately when planning, running and reviewing the hospitality event.

Assessment criteria

Pass	Merit	Distinction
<b>Learning aim A: Plan a hospitality event to meet customer requirements</b>		
<b>A.P1</b> Produce a brief event plan to meet customer requirements.	<b>A.M1</b> Produce a detailed event plan, making valuable contributions to discussions to agree role and responsibilities in the performance of activities.	<b>A.D1</b> Produce a comprehensive event plan, making significant contributions to discussions to agree role and responsibilities in the performance of activities.
<b>A.P2</b> Make a contribution to discussions to agree role and main responsibilities in the performance of hospitality activities.		
<b>Learning aim B: Organise and service a hospitality event to meet customer requirements</b>		
<b>B.P3</b> Demonstrate hospitality team activities to meet customer requirements.	<b>B.M2</b> Effectively demonstrate hospitality team activities to meet customer requirements, cooperating with others, providing support and using appropriate teamwork and communication skills in own role.	<b>B.D2</b> Confidently demonstrate hospitality team activities to meet customer requirements, showing appropriate skills and methods, and adapting behaviour to suit different situations in own role.
<b>B.P4</b> Use appropriate teamwork and communication skills in a given team member role.		
<b>Learning aim C: Review the success of a hospitality event in meeting customer requirements</b>		
<b>C.P5</b> Review the success of some aspects of an event, including feedback received.	<b>C.M3</b> Review the success of most aspects of an event, considering own and team's performance, including feedback gathered, and designing a plan for improvement.	<b>C.D3</b> Review the success of all aspects of an event, considering own and team's performance, and selecting and using feedback to devise realistic and achievable actions for improvement.
<b>C.P6</b> Identify strengths and areas for improvement to inform future events.		

## Essential information for assessment decisions

Learners must meet customer requirements for the hospitality event. These requirements must be part of the assignment brief and not devised by learners.

Assessment evidence must be independently produced by individual learners. In providing evidence for this unit, learners must demonstrate the teamwork and team interaction skills needed to work in a team in a hospitality event. Learners must show that they have planned and organised a hospitality event and appropriate team activities to an agreed standard to meet and exceed customer requirements and expectations. The standard must be agreed between the assessor and learners. Learners must also show that they have demonstrated different hospitality team activities, taking on different roles on a rotation basis, to required standards using appropriate skills. Learners should plan, organise and run a hospitality event for 40 to 60 covers, and should be given a minimum of six to eight weeks to plan it. The duration of the event will depend on its size and type.

### Learning aims A, B and C

**For distinction standard**, learners will:

- produce a well-developed plan explaining in detail the costings and the hospitality activities that need to be achieved to meet, exceed and anticipate customer needs and expectations, taking into account alternative ways to overcome potential constraints, e.g. they will set realistic timescales for achievement of the activities, which will be appropriately sequenced and the time allocated for their completion will be correct, including alternative dates and contingencies
- be proactive in encouraging team members to contribute to discussions and negotiate to agree their role and clearly define responsibilities in the performance of activities, e.g. a team leader/coordinator role
- work responsibly and reliably as a team member, providing assistance to team members and customers when required, and communicating effectively with them, being respectful and considerate. Learners will respond appropriately when given instructions, guidance or direction on the majority of occasions. They will consistently show initiative in different situations to achieve goals, demonstrating a flexible approach to situations, showing resilience when working under pressure and finding solutions
- explain their performance against required standards, noting what went well and what went wrong, describing relevant and valid strengths and weaknesses in their performance, and providing relevant and realistic suggestions on how their performance as a team member could be improved.

**For merit standard**, learners will:

- produce a detailed plan describing information of the hospitality activities that need to be achieved to meet customer needs and expectations, e.g. they will set realistic timescales for achievement of the activities, which will be in sequence and the time allocated for their completion will be mostly correct
- make an important contribution to discussions to agree their role and clearly define responsibilities in the performance of hospitality activities
- work collaboratively as a team member, providing assistance to team members and customers when required, and communicating with them, listening and showing respect. Learners will respond appropriately when given instructions, guidance or direction on most occasions. They will show initiative in different situations to achieve goals, behaving flexibly and showing resilience when faced with difficulties and working out solutions
- describe their performance against required standards, noting what went well and what went wrong, identifying relevant strengths and weaknesses in their performance, and providing relevant suggestions on how their performance as a team member could be improved.

**For pass standard**, learners will:

- produce a short plan that lists some of the hospitality activities that need to be achieved to meet customer requirements, e.g. they might only set timescales for achievement of some of the activities, the sequence might not be the most effective or the time allocated for their completion might have been underestimated
- show a basic ability to contribute to discussions to agree their role and some responsibilities in the performance of hospitality activities
- participate positively in a team activity, providing assistance to team members and customers when required. They will listen to others and when given instructions, guidance or direction on some occasions. Learners will show some initiative in making progress to meet goals, behaving in a flexible way and responding to situations appropriately
- outline their performance against required standards, noting what went wrong, listing obvious strengths and weaknesses in their performance, and providing obvious suggestions on how their performance as a team member could be improved.

## Assessment activity

The summative assessment activity takes place after learners have completed their formative development. The activity should be practical, be set in a realistic scenario and draw on learning from the unit, including the transferable skills. You will need to give learners a set period of time and number of hours in which to complete the activity. *Section 6* gives information on setting assignments and there is further information on our website.

A suggested structure for summative assessment is shown in the *Unit summary* section, along with suitable forms of evidence. This is for illustrative purposes only and can therefore be adapted to meet local needs or to assess across units where suitable opportunities exist. The information in the *Links to other units* section will be helpful in identifying opportunities for assessment across units.

The following scenario could be used to produce the required evidence for this unit. Centres are free to use comparable scenarios or other forms of evidence, provided that they meet the assessment requirements of the unit.

### Suggested scenario

You are working in the hospitality industry as an event service worker. You need to develop your skills to demonstrate healthy, safe and hygienic working practices when planning, running and reviewing a vintage-themed event. You will be observed demonstrating your skills to meet customer requirements and specifications when planning and running the hospitality event, including the selection and use of the correct skills and methods to plan and run the event. This will be supported by a review of the event in meeting the customer requirements and specifications in terms of, for example, timings, methods, skills, attitude and behaviour used by yourself and the team, quality and appearance of event and component details. When demonstrating your skills, your performance will be observed by your tutor, who will take on the role of your supervisor/manager.

**If a retake is necessary, an alternative example must be used. The following is an example of a retake assessment activity.**

Learners are planning and running an open evening event your centre is hosting. Your tutor has asked you and your colleagues to take charge of planning and running the event, and they have given you an event brief. You will be observed demonstrating your skills to meet given requirements and specifications when planning and running the hospitality event, including the selection and use of the correct skills and methods to plan and run the event. This will be supported by a review of the event in meeting the requirements and specifications in terms of, for example, timings, methods, skills, attitude and behaviour used by yourself and the team, quality and appearance of event and component details. When demonstrating your skills, your performance will be observed by your tutor, who will take on the role of your supervisor/manager.

**The event type and plan used for the retake assessment must be different from those for the first assessment activity.**

## Further information for tutors and assessors

### Delivery guidance

The following are examples of practical activities and workshops that tutors could use when developing sector and transferable skills in the delivery of this unit. Wherever possible, practical activities should be used to help learners develop both personal and sector skills in preparation for the final assessment. These suggestions are not intended as a definitive guide to cover the full GLH of the unit.

#### **Introduction to unit**

Tutor-led discussion on types of hospitality events, their purpose and the factors that need to be considered, including location, staff, budget and specific requirements.

Tutors could encourage learners to talk about events that they have been to, such as family weddings, and for them to refer to the aspects that went well and those that didn't go so well.

A visit to a hospitality event venue would be a useful introduction for learners to roles and responsibilities of those involved with events and would allow them to ask questions about the types of events held.

Learners could use their visit to a hospitality event venue to see first-hand use of available space, facilities, resources and equipment to achieve a great customer experience.

**Suggested time:** about 4 hours.

#### **Activity: How to plan a hospitality event**

Group discussion on the stages of the event planning process, the preparations required and the timings involved.

Tutor-led discussion on the use of templates and checklists for planning events to ensure that nothing is forgotten, using examples from hospitality event venues.

Learners practise filling in templates and checklists for given event scenarios in role-play situations, paying attention to detail and agreeing roles and responsibilities in the working team.

Learners are expected to use knowledge and skills gained from all the other units in the course when planning events, including knowledge of the principles behind working in the hospitality industry and skills for customer service, food and beverage service, and taking payments.

**Suggested time:** about 16 hours.

#### **Activity: How to run a hospitality event**

Tutors ask learners to set up an area for an open evening event for their centre where food and drink will be served. Learners will create a checklist for what they need to do and then feed back on how useful it was.

Tutors split learners into small groups and assign each group an area to run (e.g. welcoming prospective students and parents when they first arrive, acting as a tour guide around the school, dealing with general enquiries). Get half the class to role-play prospective parents/students and the rest to role-play the events team. Once each side has completed their duties, get the prospective parents/students to feed back. Then swap the roles and ask learners to undertake the same tasks. Tutors could be assigned in some areas to review the skills of others.

**Suggested time:** about 26 hours.

**Activity: How to review a hospitality event**

Tutors ask learners to review the event using comment cards against a plan or checklist.

Half the class could look at the strengths of the event and the other half could look at the areas for improvement. Three strengths and three areas for improvement could be highlighted in specific areas (e.g. planning, timings, the use of skills, quality and appearance of food and beverages, working methods, customer service against the brief for the event).

In small groups, learners develop recommendations based on their views and the views of others (e.g. tutors, parents, customers from industry, the work supervisor or team leader). A chart or a list could be used to record the findings.

The success of the event could be highlighted and recommendations for change could be developed in the form of written communication (e.g. a poster, an email or a letter) or a debrief in the team or by an individual.

**Suggested time:** about 8 hours.

## Essential resources

For this unit, learners must have access to a suitable hospitality event where they can take part in the planning and running of an event. Resources will depend on the type of event and could vary from centre to centre. The uniform can be decided on by the tutor. The event should be for a minimum of 40 guests so that learners get a real experience of a significant sized event.

## Links to other units

This unit draws on the knowledge and skills taught in:

- Unit 1: Working in the Hospitality Industry
- Unit 2: Food and Beverage Service Principles
- Unit 3: Enhancing the Customer Experience
- Unit 4: Food Service Skills
- Unit 5: Hot and Cold Beverage Service Skills
- Unit 6: Handling Payments and Maintaining a Payment Point.

## Employer involvement

This unit would also benefit from employer involvement in the form of using food and beverage service experts:

- to contribute to the development of the assessment for learners, planning and reviewing skills of providing a hospitality event
- as witnesses when assessing food and beverage service skills of learners.



## 4 Planning your programme

### Is there a learner entry requirement?

As a centre, it is your responsibility to ensure that recruited learners have a reasonable expectation of success on the programme. There are no formal entry requirements but we expect learners to have qualifications at or equivalent to Level 1.

Learners are most likely to succeed if they have:

- three or four GCSEs at intermediate grades and/or
- BTEC qualification(s) at Level 1 or Level 1/2
- Level 1 equivalent achievement in English and mathematics through GCSE or Functional Skills.

Learners may demonstrate ability to succeed in various ways. For example, learners may have relevant work experience or specific aptitude shown through diagnostic tests or non-education experience.

### What is involved in becoming an approved centre?

All centres must be approved before they can offer this qualification – so that you are ready to assess learners and so that we can provide the support needed. Further information is given in *Section 8 Administrative arrangements*.

### What level of sector knowledge is needed to deliver this qualification?

We do not set any requirements for tutors but expect centres to assess the overall skills and knowledge of the teaching team to ensure that they are relevant and up to date with current industry practice. This will give learners a rich programme to prepare them for progression.

### What resources are required to deliver this qualification?

As part of your centre approval, you will need to show that the necessary material resources and workspaces are available to deliver the qualification. For some units, specific resources are required.

### What makes good vocational teaching?

The approach to vocational teaching must be led by what is right for the particular sector. Therefore, each unit includes delivery guidance and suggested assessment tasks. Using the delivery guidance and suggested assessment tasks and our additional free delivery guidance and assignment briefs, you can build a course that contextualises learning in real-life and/or employment scenarios. This will naturally draw in the kind of broader attributes valued in the sector, for example personal hygiene and appearance, organisation of own work, good communication skills, as well as the more general skills needed in work that fit well with project-based learning, for example teamwork, independent learning.

## What are the requirements for meaningful employer involvement?

This qualification has been designed as a Technical Certificate qualification and as an approved centre you are required to ensure that during their study, every learner has access to meaningful activity involving employers. See *Section 2 Structure* for the requirements for employer involvement.

### Support for employer involvement

It is important that you give learners opportunities that are of a high quality and which are directly relevant to their study. We will support you in this through guidance materials and by giving you examples of best practice. See *Section 11 Resources and support* for details of the support available, including the Work Experience Toolkit.

## What support is available for delivery and assessment?

We provide a wealth of support materials, including schemes of learning, delivery plans, assignment briefs, additional papers for external assessments and examples of marked learner work.

To support you with planning your assessments, you will be allocated a Standards Verifier early in the planning stage. There will be extensive training programmes and support from our Subject Advisor team.

For further details see *Section 11 Resources and support*.

## How will my learners become more employable through this qualification?

This qualification is mapped to National Occupational Standards in Hospitality.

Learners will be acquiring the key technical and sector knowledge, and practical and technical skills that employers need. Employability skills, such as teamwork and entrepreneurialism, and completing realistic tasks have also been built into the design of the learning aims and content. This gives tutors the opportunity to use relevant contexts, scenarios and materials to enable learners to develop a portfolio of evidence that demonstrates the breadth of their skills and knowledge in a way that equips them for employment.

## 5 Assessment structure

The Pearson BTEC Level 2 Diploma is assessed using a combination of *internal assessments*, which are set and marked by tutors, and *external assessments*, which are set and marked by Pearson.

We have taken great care to ensure that the assessment method chosen is appropriate to the content of the unit and in line with requirements from employers.

In developing an overall plan for delivery and assessment for the programme you will need to consider the order in which you deliver units, whether delivery is over short or long periods and when assessment can take place.

One internally-assessed unit in the qualification is defined as synoptic (see *Section 2 Structure*). A synoptic assessment is one that a learner should take later in a programme and in which they will be expected to apply learning from a range of units. As such, you must plan the assignments that learners can demonstrate learning from across their programme.

We have addressed the need to ensure that the time allocated to final assessment of internal and external units is reasonable so that there is sufficient time for teaching and learning, formative assessment and development of transferable skills.

In administering internal and external assessment, the centre needs to be aware of the specific procedures and policies that apply, for example to registration, entries and results. An overview with signposting to relevant documents is given in *Section 8 Administration arrangements*.

## 6 Internal assessment

This section gives an overview of the key features of internal assessment and how you, as an approved centre, can offer it effectively. The full requirements and operational information are given in the *Pearson Guide to Quality Assurance* available on our website. All members of the assessment team need to refer to this document.

For this qualification, it is important that you can meet the expectations of stakeholders and the needs of learners by providing a programme that is practical and applied. You can tailor programmes to meet local needs and use links with local employers and the wider vocational sector.

When internal assessment is operated effectively, it is challenging, engaging, practical and up to date. It must also be fair to all learners and meet national standards.

### Principles of internal assessment

Our approach to internal assessment for this qualification offers flexibility in how and when you assess learners, provided that you meet assessment and quality assurance requirements. You will need to take account of the requirements of the unit format, which we explain in *Section 3 Units*, and the requirements for delivering assessment given in *Section 8 Administrative arrangements*.

### Operating internal assessment

#### The assessment team

It is important that there is an effective team for internal assessment so that all assessment is planned and verified. For this qualification it is likely that the team will be small but it is still necessary to ensure that the assessment process is followed. Full information is given in the *Pearson Guide to Quality Assurance*.

The key roles are:

- the Lead Internal Verifier (Lead IV) for the qualification has responsibility for the planning, record keeping and standard setting for the qualification. The Lead IV registers with Pearson annually and organises training using our support materials
- Internal Verifiers (IVs) check that assignments and assessment decisions are valid and that they meet our requirements. In a small team, all people will normally be assessors and IVs. No one can verify their own actions as an assessor.
- assessors set or use assignments to assess learners to national standards.

#### Planning and record keeping

The Lead IV should make sure that there is a plan for assessment of the internally-assessed units and maintain records of assessment undertaken. The key records are:

- verification of assignment briefs
- learner authentication declarations
- assessor decisions on assignments, with feedback given to learners
- verification of assessment decisions.

Examples of records and further information are given in the *Pearson Guide to Quality Assurance*.

### Effective organisation

Internal assessment needs to be well organised so that learners' progress can be tracked and so that we can monitor that assessment is being carried out in line with national standards. We support you through, for example, providing training materials and sample documentation. Our online myBTEC service can help support you in planning and record keeping. Further information on using myBTEC can be found in *Section 11 Resources and support* and on our website.

It is particularly important that you manage the overall assignment programme and deadlines to make sure that learners are able to complete assignments on time.

### Learner preparation

To ensure that you provide effective assessment for your learners, you need to make sure that they understand their responsibilities for assessment and the centre's arrangements.

From induction onwards, you will want to ensure that learners are motivated to work consistently and independently to achieve the requirements of the qualifications. Learners need to understand how assignments are used, the importance of meeting assignment deadlines, and that all the work submitted for assessment must be their own.

You will need to give learners a guide that explains how assignments are used for assessment, how assignments relate to the teaching programme, and how learners should use and reference source materials, including what would constitute plagiarism. The guide should also set out your approach to operating assessment, such as how learners must submit work and request extensions.

You are encouraged to employ a range of formative assessment approaches before putting learners through to the assignments to formally assess the units. Formative assessment supports teaching and learning, and should be ongoing throughout the learning process. It enables tutors to enhance learning by giving learners constructive feedback so that they can identify their strengths and weaknesses, and to put measures in place to target areas that need work. Formative assessment approaches that incorporate reflective learning and regular skills assessment are important in encouraging self-development and reflective practice, to ensure that learners progress.

### Setting assignments

An assignment is issued to learners as an assignment brief with a defined start date, a completion date and clear requirements for the evidence that they need to provide. This assignment will be separate from the practice and exploration activities that have been used during the learning period, and learners must understand that the assignment is being used to judge the learning aims. There may be specific observed practical components during the assignment period. Assignments can be divided into tasks and may require several forms of evidence. A valid assignment will enable a clear and formal assessment outcome, based on the assessment criteria.

When setting your assignments, you need to work with the information given in the Essential information for assessment decisions and the Assessment activity sections of the units. You can choose to use the suggested scenarios or to adapt them to take account of local circumstances, provided that assignments are verified.

In designing your own assignment briefs you should bear in mind the following points.

- A learning aim must always be assessed as a whole and must not be split into two or more tasks.
- Assignments must be structured to allow learners to demonstrate the full range of achievement at all grade levels. Learners need to be treated fairly by being given the opportunity to achieve a higher grade if they have the ability.
- Learners should be given clear tasks, activities and structures for evidence; the criteria should not be given as tasks.
- You must ensure that assignments for synoptic assessment are designed to enable learners to draw on the specific units identified and demonstrate that they can identify and use effectively an appropriate selection of skills, techniques, concepts, theories and knowledge in an integrated way. Assignments for the synoptic unit will be monitored at programme level as part of the standards verification process to ensure that they encourage learners to select and apply their learning from across the qualification in an integrated way.
- Where there is a requirement for assessment to be conducted in the real work environment (mandatory work placement), assignments must be designed to facilitate this. Where there is no mandatory requirement for workplace assessment but learners will be in work placement or work experience settings as a part of the programme, then it would be worthwhile if these assignments were also designed for completion in the real work environment. You must ensure that the work placement or work experience setting gives learners the opportunity to achieve at all grade levels.

As assignments provide a final assessment, they will draw on the specified range of teaching content for the learning objective. The specified teaching content is compulsory. The evidence for assessment need not cover every aspect of the teaching content as learners will normally be given particular examples, case studies or contexts in their assignments. For example, if a learner is carrying out a practical performance, then they must address all the relevant range of content that applies in that instance.

An assignment brief should have:

- a vocational scenario or context that motivates the learner to apply their learning through the assignment
- an audience or purpose for which the evidence is being provided
- clear instructions to the learner about what they are required to do, normally set out through a series of tasks.

### Forms of evidence

The units allow for a variety of forms of evidence to be used, provided that they are suited to the type of learning aim and the learner being assessed. For most units, the practical demonstration of skills is necessary. The units give you information on suitable forms of evidence and that would give learners the opportunity to apply a range of transferable and sector skills. Centres may choose to use different suitable forms for evidence to those proposed. Overall, learners should be assessed using varied forms of evidence.

The main forms of evidence include:

- observation and recordings of practical tasks or performance in the workplace with supporting evidence
- projects
- recordings of role play, interviews and other types of simulated activities
- oral or written presentations with assessor questioning
- work logbooks, reflective journals.

It is important to note that an observation record is a source of evidence and does not confer an assessment decision. It must be sufficiently detailed to enable others to make a judgement about the quality and sufficiency of the performance and must clearly document the rationale for the assessment decision. Observation records should be accompanied by supporting evidence, which may take the form of videos, audio recordings, photographs, preparation notes, learner logs and other similar types of record.

The form(s) of evidence selected must allow:

- the learner to provide all the evidence required for the learning aim(s) and the associated assessment criteria at all grade levels
- the learner to produce evidence that is their own independent work
- a verifier to independently reassess the learner to check the assessor's decisions.

Centres need to take particular care in ensuring that learners produce independent work.

## Making valid assessment decisions

### Assessment decisions through applying unit-based criteria

Assessment decisions for this qualification are based on the specific criteria given in each unit and set at each grade level. The way in which individual units are written provides a balance of assessment of sector-specific knowledge, technical and practical skills, and transferable skills appropriate to the purpose of the qualification.

Pass, Merit and Distinction criteria all relate to individual learning aims. The assessment criteria for a unit are hierarchical and holistic where in satisfying the M criteria a learner would also have satisfied the P criteria. The unit assessment grid shows the relationships among the criteria so that assessors can apply all the criteria to the learner's evidence at the same time.

Assessors must show how they have reached their decisions using the criteria in the assessment records. When a learner has completed all the assessment for a unit then the assessment team will give a grade for the unit. This is given according to the highest level for which the learner is judged to have met all the criteria. Therefore:

- to achieve a Distinction, a learner must have satisfied all the Distinction criteria (and all the Pass and Merit criteria) ); these define outstanding performance across the unit as a whole
- to achieve a Merit, a learner must have satisfied all the Merit criteria (and all the Pass criteria) through high performance in each learning aim
- to achieve a Pass, a learner must have satisfied all the Pass criteria for the learning aims, showing coverage of the unit content and therefore attainment at Level 2 of the national framework.

The award of a Pass is a defined level of performance and cannot be given solely on the basis of a learner completing assignments. Learners who do not satisfy the Pass criteria should be reported as Unclassified.

### Making assessment decisions using criteria

As an assessor, you review authenticated learner work and make judgements on standards using the assessment criteria and the supporting information provided in units and training materials. The evidence from a learner can be judged using all the relevant criteria at the same time. The assessor needs to make a judgement against each criterion that evidence is present and sufficiently comprehensive.

Assessors should use the following information and support in reaching assessment decisions:

- the Essential information for assessment decisions section in each unit
- your Lead IV and assessment team's collective experience, supported by the standardisation materials we provide.

Once the team has agreed the outcome, a formal assessment decision is recorded and reported to learners. The information given:

- must show the formal decision and indicate where criteria have been met
- may show where attainment against criteria has not been demonstrated
- avoid giving direct, specific instructions on how the learner can improve the evidence to achieve a higher grade.

### Authenticity of learner work

Assessors must ensure that evidence is authentic to a learner through setting valid assignments and supervising them during the assessment period. Assessors must take care not to provide direct input, instructions or specific feedback that may compromise authenticity.

Once an assessment has begun, learners must not be given feedback that relates specifically to their evidence and how it can be improved, learners must work independently.

An assessor must assess only learner work that is authentic, i.e. learners' own independent work. Learners must authenticate the evidence that they provide for assessment through signing a declaration stating that it is their own work.

Assessors must complete a declaration that:

- the evidence submitted for this assignment is the learner's own
- the learner has clearly referenced any sources used in the work
- they understand that false declaration is a form of malpractice.

Centres can use Pearson templates or their own templates to document authentication.

During assessment, an assessor may suspect that some or all of the evidence from a learner is not authentic. The assessor must then take appropriate action using the centre's policies for malpractice. Further information is given in *Section 8 Administrative arrangements*.

### Resubmission of improved evidence

An assignment provides the final assessment for the relevant learning aims and is normally a final assessment decision, except where the Lead IV approves one opportunity to resubmit improved evidence based on the completed assignment brief.

The Lead IV has the responsibility to make sure that resubmission is operated fairly. This means:

- checking that a learner can be reasonably expected to perform better through a second submission, for example that the learner has not performed as expected
- making sure that giving a further opportunity does not give an unfair advantage over other learners, for example through the opportunity to take account of feedback given to other learners
- checking that the learner will be able to provide improved evidence without further guidance and that the original evidence submitted remains valid.

Once an assessment decision has been given to the learner, the resubmission opportunity must have a deadline within 15 working days in the same academic year.

For assessment to be fair, it is important that learners are all assessed in the same way and that some learners are not advantaged by having additional time or the opportunity to learn from others. Therefore, learners who did not complete assignments by your planned deadline or an authorised extension deadline, if one was given for specific circumstances, may not have the opportunity to subsequently resubmit. Similarly, learners who submit work that is not their own should not be given an opportunity to resubmit.

The outcome of any resubmission of the assignment by the learner is then recorded as the final decision.

A learner who has not achieved their expected level of performance in the relevant learning aims **after resubmission** of an assignment may be offered a single retake opportunity using a new assignment. The highest grade that may be awarded is a Pass.

The Lead IV must authorise a retake with a new assignment only in exceptional circumstances and where it is necessary, appropriate and fair to do so. For further information on offering a retake opportunity you should refer to the *BTEC Centre Guide to Assessment* available on our website. We provide information on writing assignments for retakes on our website ([www.btec.co.uk/keydocuments](http://www.btec.co.uk/keydocuments)).

## 7 External assessment

A summary of the type and availability of external assessment for this qualification is given below. These external assessments assess units that are 33% of the total qualification GLH and are weighted to contribute the same proportion of the overall qualification grade. The external assessments for these qualifications are available so that learners may be assessed at any suitable point in their programme.

See the units and sample assessment materials for more information.

Unit	Type	Availability
<b>Unit 1: Working in the Hospitality Industry</b>	<ul style="list-style-type: none"> <li>• Onscreen tests set and marked by Pearson.</li> <li>• 75 minutes.</li> <li>• 60 marks.</li> </ul>	On demand First assessment January 2018
<b>Unit 2: Food and Beverage Service Principles</b>	<ul style="list-style-type: none"> <li>• Onscreen tests set and marked by Pearson.</li> <li>• 75 minutes.</li> <li>• 60 marks.</li> </ul>	On demand First assessment January 2018

For *Units 1* and *2*, onscreen tests are available on demand starting from January 2018. These tests use a range of question types, including examiner-marked. As tests have a full marking process, results for individual learners will be released once the process is complete and the time to issue results will vary.

We will provide a detailed timetable for entries, assessment and results annually in our *Information Manual*. Resits cannot be scheduled until a learner's result has been issued.

Learners must be prepared for external assessment by the time they undertake it. In preparing learners for assessment, you will want to take account of required learning time, the relationship with any other external assessments and opportunities for resits. Learners who take an external assessment and who do not perform as expected may have one further opportunity using a later external assessment. Learners cannot take a further assessment until they have a result from the first assessment.

Learners who attempt an external assessment twice will have the better of the grades achieved used in the final grade calculation for the qualification.

### Units

The externally-assessed units have a specific format which we explain in *Section 3 Units*. The content of units will be sampled across external assessments over time through appropriate papers. The ways in which learners are assessed are shown through the assessment outcomes and grading descriptors

## Sample assessment materials

Each externally-assessed unit has a set of sample assessment materials (SAMs) that accompanies this specification. The SAMs are there to give you an example of what the external assessment will look like in terms of the feel and level of demand of the assessment.

The SAMs show the range of possible activity types that may appear in the actual assessments and give you a good indication of how the assessments will be structured. While SAMs can be used for practice with learners, as with any assessment the content covered and specific details of the activities will vary in each assessment.

These sample assessments can be downloaded from our website.

## Conducting external assessments

Centres must make arrangements for the secure delivery of external assessments. You need to ensure that learners are aware that they need to work independently and be aware of the requirements for any external assessment

Each external assessment has a defined degree of control under which it must take place. We define degrees of control as follows.

### High control

This is the completion of assessment in formal invigilated examination conditions.

This applies to onscreen tests.

### Medium control

This is completion of assessment, usually over a longer period of time, which may include a period of controlled conditions. The controlled conditions may allow learners to access resources, prepared notes or the internet to help them complete the task. This applies to task-based assessments.

Further information on responsibilities for conducting external assessment is given in the document *Instructions for Conducting External Assessments*, available on our website.

## 8 Administrative arrangements

### Introduction

This section focuses on the administrative requirements for delivering a BTEC qualification. It will be of value to Quality Nominees, Lead IVs, Programme Leaders and Examinations Officers.

### Learner registration and entry

Shortly after learners start the programme of learning, you need to make sure that they are registered for the qualification and that appropriate arrangements are made for internal and external assessment. You need to refer to our *Information Manual* for information on making registrations for the qualification and entries for external assessments.

Learners can be formally assessed only for a qualification on which they are registered. If learners' intended qualifications change, for example if a learner decides to choose a different pathway specialism, then the centre must transfer the learner appropriately.

### Access to assessment

Both internal and external assessments need to be administered carefully to ensure that all learners are treated fairly, and that results and certification are issued on time to allow learners to progress to chosen progression opportunities.

Our equality policy requires that all learners have equal opportunity to access our qualifications and assessments, and that our qualifications are awarded in a way that is fair to every learner. We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve for undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Further information on access arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational Qualifications*.

## Administrative arrangements for internal assessment

### Records

You are required to retain records of assessment for each learner. Records should include assessments taken, decisions reached and any adjustments or appeals. Further information can be found in our *Information Manual*. Records must be maintained as specified as we may ask to audit them.

### Reasonable adjustments to assessment

To ensure that learners have fair access to demonstrate the requirements of the assessments, a reasonable adjustment is one that is made before a learner takes an assessment. You are able to make adjustments to internal assessments to take account of the needs of individual learners. In most cases this can be achieved through a defined time extension or by adjusting the format of evidence. We can advise you if you are uncertain as to whether an adjustment is fair and reasonable. You need to plan for time to make adjustments if necessary.

Further details on how to make adjustments for learners with protected characteristics are given on our website in the document *Supplementary guidance for reasonable adjustment and special consideration in vocational internally assessed units*.

### Special consideration

Special consideration is given after an assessment has taken place for learners who have been affected by adverse circumstances, such as illness. You must operate special consideration in line with our policy (see previous paragraph). You can provide special consideration related to the period of time given for evidence to be provided or for the format of the assessment if it is equally valid. You may not substitute alternative forms of evidence to that required in a unit, or omit the application of any assessment criteria to judge attainment. Pearson can consider applications for special consideration only in line with the policy.

### Appeals against assessment

Your centre must have a policy for dealing with appeals from learners. These appeals may relate to assessment decisions being incorrect or assessment being conducted unfairly. The first step in such a policy could be a consideration of the evidence by a Lead IV or other member of the programme team. The assessment plan should allow time for potential appeals after assessment decisions have been given to learners. If there is an appeal by a learner you must document the appeal and its resolution. Learners have a final right of appeal to Pearson but only if the procedures that you have put in place have not been followed. Further details are given in our policy *Enquiries and appeals about Pearson Vocational Qualifications*.

## Administrative arrangements for external assessment

### Entries and resits

For information on the timing of assessment and entries, please refer to the annual examinations timetable on our website. Learners are permitted to have one resit of an external assessment.

### Access arrangements requests

Access arrangements are agreed with Pearson before an assessment. They allow learners with special educational needs, disabilities or temporary injuries to:

- access the assessment
- show what they know and can do without changing the demands of the assessment.

Access arrangements should always be processed at the time of registration. Learners will then know what type of arrangements are available in place for them.

### Granting reasonable adjustments

For external assessment, a reasonable adjustment is one that we agree to make for an individual learner. A reasonable adjustment is defined for the individual learner and informed by the list of available access arrangements.

Whether an adjustment will be considered reasonable will depend on a number of factors to include the:

- needs of the learner with the disability
- effectiveness of the adjustment
- cost of the adjustment; and
- likely impact of the adjustment on the learner with the disability and other learners.

Adjustment may be judged unreasonable and not approved if it involves unreasonable costs, timeframes or affects the integrity of the assessment.

### Special consideration requests

Special consideration is an adjustment made to a learner's mark or grade after an external assessment to reflect temporary injury, illness or other indisposition at the time of the assessment. An adjustment is made only if the impact on the learner is such that it is reasonably likely to have had a material effect on that learner being able to demonstrate attainment in the assessment.

Centres are required to notify us promptly of any learners who they believe have been adversely affected and request that we give special consideration. Further information can be found in the special requirements section on our website.

## Dealing with malpractice in assessment

Malpractice means acts that undermine the integrity and validity of assessment, the certification of qualifications, and/or that may damage the authority of those responsible for delivering the assessment and certification.

Pearson does not tolerate actions (or attempted actions) of malpractice by learners, centre staff or centres in connection with Pearson qualifications. Pearson may impose penalties and/or sanctions on learners, centre staff or centres where incidents (or attempted incidents) of malpractice have been proven.

Malpractice may arise or be suspected in relation to any unit or type of assessment within the qualification. For further details regarding malpractice and advice on preventing malpractice by learners please see Pearson's *Centre Guidance: Dealing with Malpractice*, available on our website.

The procedures we ask you to adopt vary between units that are internally assessed and those that are externally assessed.

### Internally-assessed units

Centres are required to take steps to prevent malpractice and to investigate instances of suspected malpractice. Learners must be given information that explains what malpractice is for internal assessment and how suspected incidents will be dealt with by the centre. The *Centre Guidance: Dealing with Malpractice* document gives full information on the actions we expect you to take.

Pearson may conduct investigations if we believe that a centre is failing to conduct internal assessment according to our policies. The above document gives further information, examples and details the penalties and sanctions that may be imposed.

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

### Externally-assessed units

External assessment means all aspects of units that are designated as external in this specification, including preparation for tasks and performance. For these assessments, centres must follow the JCQ procedures set out in the latest version of *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* ([www.jcq.org.uk](http://www.jcq.org.uk)).

In the interests of learners and centre staff, centres need to respond effectively and openly to all requests relating to an investigation into an incident of suspected malpractice.

### Learner malpractice

Heads of Centres are required to report incidents of any suspected learner malpractice that occur during Pearson external assessments. We ask that centres do so by completing a *JCQ Form M1* (available at [www.jcq.org.uk/exams-office/malpractice](http://www.jcq.org.uk/exams-office/malpractice)) and emailing it and any accompanying documents (signed statements from the learner, invigilator, copies of evidence, etc.) to the Investigations Team at [candidatemaalpractice@pearson.com](mailto:candidatemaalpractice@pearson.com). The responsibility for determining appropriate sanctions or penalties to be imposed on learners lies with Pearson.

Learners must be informed at the earliest opportunity of the specific allegation and the centre's malpractice policy, including the right of appeal. Learners found guilty of malpractice may be disqualified from the qualification for which they have been entered with Pearson.

### Teacher/centre malpractice

Heads of Centres are required to inform Pearson's Investigations Team of any incident of suspected malpractice by centre staff, before any investigation is undertaken. Heads of centres are requested to inform the Investigations Team by submitting a *JCQ Form M2(a)* (available at [www.jcq.org.uk/exams-office/malpractice](http://www.jcq.org.uk/exams-office/malpractice)) with supporting documentation to [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com). Where Pearson receives allegations of malpractice from other sources (for example Pearson staff or anonymous informants), the Investigations Team will conduct the investigation directly or may ask the head of centre to assist.

Incidents of maladministration (accidental errors in the delivery of Pearson qualifications that may affect the assessment of learners) should also be reported to the Investigations Team using the same method.

Heads of Centres/Principals/Chief Executive Officers or their nominees are required to inform learners and centre staff suspected of malpractice of their responsibilities and rights; see Section 6.15 of the *JCQ Suspected Malpractice in Examinations and Assessments Policies and Procedures* document.

Pearson reserves the right in cases of suspected malpractice to withhold the issuing of results and/or certificates while an investigation is in progress. Depending on the outcome of the investigation results and/or certificates may be released or withheld.

You should be aware that Pearson may need to suspend certification when undertaking investigations, audits and quality assurances processes. You will be notified within a reasonable period of time if this occurs.

### Sanctions and appeals

Where malpractice is proven we may impose sanctions or penalties.

Where learner malpractice is evidenced, penalties may be imposed such as:

- mark reduction for external assessments
- disqualification from the qualification
- being barred from registration for Pearson qualifications for a period of time.

If we are concerned about your centre's quality procedures we may impose sanctions such as:

- working with you to create an improvement action plan
- requiring staff members to receive further training
- placing temporary blocks on your certificates
- placing temporary blocks on registration of learners
- debarring staff members or the centre from delivering Pearson qualifications
- suspending or withdrawing centre approval status.

The centre will be notified if any of these apply.

Pearson has established procedures for centres that are considering appeals against penalties and sanctions arising from malpractice. Appeals against a decision made by Pearson will normally be accepted only from heads of centres (on behalf of learners and/or members or staff) and from individual members (in respect of a decision taken against them personally). Further information on appeals can be found in our *Enquiries and Appeals* policy, which is on our website. In the initial stage of any aspect of malpractice, please notify the Investigations Team by email via [pqsmalpractice@pearson.com](mailto:pqsmalpractice@pearson.com) who will inform you of the next steps.

## Certification and results

Once a learner has completed all the required units for a qualification, even if final results for external assessments have not been issued, then the centre can claim certification for the learner, provided that quality assurance has been successfully completed. For the relevant procedures please refer to our *Information Manual*. You can use the information provided on qualification grading to check overall qualification grades.

### Results issue

Results for external assessment will be issued once marking is complete.

Qualification results will be issued once a learner has completed all components of the qualification and you have claimed certification. The result will be in the form of a grade. You should be prepared to discuss performance with learners, making use of the information we provide and post-results services.

### Post-assessment services

Once results for external assessments are issued, you may find that the learner has failed to achieve the qualification or to attain an anticipated grade. It is possible to transfer or reopen registration in some circumstances. Our *Information Manual* gives further information.

### Changes to qualification requests

Where a learner who has taken a qualification wants to resit an externally-assessed unit to improve their qualification grade, you firstly need to decline their overall qualification grade. You must decline the grade before the certificate is issued. For a learner receiving their results in August, you should decline the grade by the end of September if the learner intends to resit an external assessment.

## Additional documents to support centre administration

As an approved centre, you must ensure that all staff delivering, assessing and administering the qualifications have access to this documentation. These documents are reviewed annually and are reissued if updates are required.

- *Pearson Quality Assurance Handbook*: this sets out how we will carry out quality assurance of standards and how you need to work with us to achieve successful outcomes.
- *Information Manual*: this gives procedures for registering learners for qualifications, transferring registrations, entering for external assessments and claiming certificates.
- *Lead Examiners' Reports*: these are produced after each series for each external assessment and give feedback on the overall performance of learners in response to tasks or questions set.
- *Instructions for the Conduct of External Assessments*: explains our requirements for the effective administration of external assessments, such as invigilation and submission of materials.
- Regulatory policies: our regulatory policies are integral to our approach and explain how we meet internal and regulatory requirements. We review the regulated policies annually to ensure that they remain fit for purpose. Policies related to this qualification include:
  - adjustments for candidates with disabilities and learning difficulties, access arrangements and reasonable adjustments for general and vocational qualifications
  - age of learners
  - centre guidance for dealing with malpractice
  - recognition of prior learning and process.

This list is not exhaustive and a full list of our regulatory policies can be found on our website.

## 9 Quality assurance

### Centre and qualification approval

As part of the approval process, your centre must make sure that the resource requirements listed below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and/or occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have in place appropriate health and safety policies relating to the use of equipment by learners.
- Centres must deliver the qualification in accordance with current equality legislation.
- Centres should refer to the teacher guidance section in individual units to check for any specific resources required.

### Continuing quality assurance and standards verification

On an annual basis, we produce the Pearson Quality Assurance Handbook. It contains detailed guidance on the quality processes required to underpin robust assessment, internal verification and planning of appropriate employer involvement.

The key principles of quality assurance are that:

- a centre delivering BTEC programmes must be an approved centre, and must have approval for the programmes or groups of programmes that it is delivering
- the centre agrees, as part of gaining approval, to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; it must abide by these conditions throughout the period of delivery
- Pearson makes available to approved centres a range of materials and opportunities, through online standardisation, intended to exemplify the processes required for effective assessment, and examples of effective standards. Approved centres must use the materials and services to ensure that all staff delivering BTEC qualifications keep up to date with the guidance on assessment
- an approved centre must follow agreed protocols for standardisation of assessors and verifiers, for the planning, monitoring and recording of assessment processes, and for dealing with special circumstances, appeals and malpractice.

The approach of quality-assured assessment is through a partnership between an approved centre and Pearson. We will make sure that each centre follows best practice and employs appropriate technology to support quality-assurance processes, where practicable. We work to support centres and seek to make sure that our quality-assurance processes do not place undue bureaucratic processes on centres. We monitor and support centres in the effective operation of assessment and quality assurance.

The methods we use to do this for BTEC Technical Certificate and Diploma qualifications include:

- making sure that all centres complete appropriate declarations at the time of approval
- undertaking approval visits to centres
- making sure that centres have effective teams of assessors and verifiers who are trained to undertake assessment
- undertaking an overarching review and assessment of a centre's strategy for ensuring sufficient and appropriate engagement with employers at the beginning of delivery of any BTEC programme(s)
- undertaking a review of the employer involvement planned at programme level to ensure its appropriateness at a time when additional activities can be scheduled where necessary
- assessment sampling and verification, through requested samples of assessments, completed assessed learner work and associated documentation
- an overarching review and assessment of a centre's strategy for delivering and quality assuring its BTEC programmes.

Centres that do not fully address and maintain rigorous approaches to delivering, assessing and quality assurance cannot seek certification for individual programmes or for the BTEC Technical Certificate and Diploma qualifications. An approved centre must make certification claims only when authorised by us and strictly in accordance with requirements for reporting.

Centres that do not comply with remedial action plans may have their approval to deliver qualifications removed.

## 10 Understanding the qualification grade

### Awarding and reporting for the qualification

This section explains the rules that we apply in providing an overall qualification grade for each learner. The final grade awarded for a qualification represents a holistic performance across all of the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units will be balanced by a lower outcome in others.

The awarding and certification of these qualifications will comply with the requirements of the Office of Qualifications and Examinations Regulation (Ofqual).

### Eligibility for an award

In order to be awarded the qualification, a learner must complete all units and achieve a Pass or above in all units. See the structure in *Section 2 Structure* for full details.

To achieve the qualification grade, learners must:

- achieve and **report a grade** (D, M or P) for all units within a valid combination
- achieve the **minimum number of points** at a grade threshold.

Where there are optional units in a qualification, it is the responsibility of the centre to ensure that a correct unit combination is adhered to. Learners who do not pass all the required units shown in the structure will not achieve the qualification. For example, learners who have not passed the required external units or who have not taken enough mandatory units will not achieve that qualification even if they have enough points.

### Calculation of the qualification grade

The final grade awarded for a qualification represents an aggregation of a learner's performance across the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units may be balanced by a lower outcome in others.

In the event that a learner achieves more than the required number of optional units (where available), the mandatory units along with the optional units with the highest grades will be used to calculate the overall result, subject to the eligibility requirements for that particular qualification title.

The qualification is awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Diploma	PP to DD

The *Calculation of qualification grade* table, shown further on in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. The most up to date table will be issued on our website.

Pearson will monitor the qualification standard and reserves the right to make appropriate adjustments.

Learners who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. Our *Information Manual* gives full information.

**Points available for internal units**

The table below shows the number of **points** available for internal units. For each internal unit, points are allocated depending on the grade awarded.

	Unit size	
	30 GLH	60 GLH
<b>U</b>	0	0
<b>Pass</b>	8	16
<b>Merit</b>	12	24
<b>Distinction</b>	16	32

**Points available for the external units**

Raw marks from the external units will be awarded **points** based on performance in the assessment. The points scores available for each external unit at grade boundaries are as follows.

	Unit size
	60 GLH
<b>U</b>	0
<b>Pass</b>	16
<b>Merit</b>	24
<b>Distinction</b>	32

We will automatically calculate the points for each external unit once the external assessment has been marked and grade boundaries have been set. For more details about how we set grade boundaries in the external assessment please go to our website.

### Claiming the qualification grade

Subject to eligibility, we will automatically calculate the qualification grade for your learners when the internal unit grades are submitted and the qualification claim is made. Learners will be awarded qualification grades for achieving the sufficient number of points within the ranges shown in the relevant calculation of qualification grade table for the cohort.

### Calculation of qualification grade table

Diploma	
Grade	Points threshold
PP	96
MP	112
MM	128
DM	152
DD	176

The table is subject to review over the lifetime of the qualification. The most up-to-date version will be issued on our website.

**Examples of grade calculations based on table applicable to registrations from September 2017**

**Example 1:** Achievement of a Diploma with a PP grade

Unit	GLH	Type	Grade	Points
1	60	External	Pass	16
2	60	External	Pass	16
3	30	Internal	Pass	8
4	60	Internal	Pass	16
5	60	Internal	Pass	16
6	30	Internal	Merit	12
7	60	Internal	Pass	16
	<b>360</b>		<b>PP</b>	<b>100</b>

The learner has achieved a Pass or above in all units.

The learner has sufficient points for a PP grade.

**Example 2:** Achievement of a Diploma with a DD grade

Unit	GLH	Type	Grade	Points
1	60	External	Merit	24
2	60	External	Merit	24
3	30	Internal	Distinction	16
4	60	Internal	Distinction	32
5	60	Internal	Distinction	32
6	30	Internal	Distinction	16
7	60	Internal	Distinction	32
	<b>360</b>		<b>DD/D</b>	<b>176</b>

The learner has sufficient points for a DD grade.

**Example 3:** Achievement of a Diploma with an Unclassified result

Unit	GLH	Type	Grade	Points
1	60	External	Merit	24
2	60	External	Merit	24
3	30	Internal	Unclassified	0
4	60	Internal	Pass	16
5	60	Internal	Pass	16
6	30	Internal	Pass	8
7	60	Internal	Distinction	32
	<b>360</b>		<b>U</b>	<b>120</b>

The learner has a U in Unit 3.

The learner has sufficient points for a MP but has not met the requirement for a Pass, or above, in all Units.

## 11 Resources and support

Our aim is to give you support to enable you to deliver Pearson BTEC Level 2 Technicals with confidence. You will find resources to support teaching and learning, assessing, and professional development on our website.

### Support for setting up your course and preparing to teach

#### Schemes of Learning

Our free Schemes of Learning give you suggestions and ideas for how to deliver the units in the qualifications, including opportunities to develop employability skills, tips on embedding mathematics and English, and how to link units through holistic assessments.

#### Delivery planner

High-level models showing how the course can be delivered over different timescales, for example six months, one year or two years.

#### myBTEC

myBTEC is a free, online toolkit that lets you plan and manage your BTEC provision from one place. It supports the delivery, assessment and quality assurance of BTEC qualifications in centres and supports teachers with the following activities:

- checking that a programme is using a valid combination of units
- creating and verifying assignment briefs (including access to a bank of assignment briefs that can be customised)
- creating assessment plans and recording assessment decisions
- tracking the progress of every learner throughout their programme.

To find out more about myBTEC, visit the myBTEC page on the support services section of our website.

### Support for teaching and learning

#### Work Experience Toolkit

Our free Work Experience Toolkit gives guidance for tutors, assessors, work-based supervisors and learners on how to make the most of work placements and work experience.

Pearson Learning Services provides a range of engaging resources to support BTEC qualifications. Teaching and learning resources may also be available from a number of other publishers. Details of Pearson's own resources and of all endorsed resources are on our website.

### Support for assessment

#### Sample assessment materials for externally-assessed units

Sample assessment materials (SAMs) are available for externally-assessed units and can be downloaded from the Pearson Qualifications website. An additional set of sample assessment materials for externally-assessed units will also be available, giving your learners further opportunities for practice.

#### Sample assessment materials for internally-assessed units

We do not prescribe the assessments for the internally-assessed units. Rather, we allow you to set your own, according to your learners' preferences.

We provide assignment briefs which are approved by Pearson Standards Verifiers.

## Sample marked learner work

To support you in understanding the expectation of the standard at each grade, examples of sample marked learner work will be made available on our website.

## Training and support from Pearson

### People to talk to

There are lots of people who can support you and give you advice and guidance on delivering your Pearson BTEC Level 2 Technicals. They include the following.

- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, in preparing learner work and providing quality assurance through sampling.
- Subject Advisors – available for all sectors. They understand all Pearson qualifications in their sector and so can answer sector-specific queries on planning, teaching, learning and assessment.
- Curriculum Development Managers (CDMs) – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. CDMs often run network events.
- Customer Services – the 'Support for You' section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

### Training and professional development

We provide a range of training and professional development events to support the introduction, delivery, assessment and administration of the Pearson BTEC Level 2 Technicals

These sector-specific events, developed and delivered by specialists, are available both face to face and online.

A close-up photograph of a hand holding a wine glass, with the glass tilted and containing a small amount of liquid. The background is blurred, showing other people and lights, suggesting a social or dining setting.

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