

Pearson BTEC Level 3 Certificate in Principles of Hospitality Retail Outlet Management (QCF)

Specification

BTEC Specialist qualification

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Issue 2

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 2. Key changes are sidelined. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

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Purpose of this specification

The purpose of a specification, as defined by Ofqual, is to set out:

- the qualification's objective
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding that the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which the learner's level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.

1 Introducing Pearson BTEC Specialist qualifications

For more than 25 years, Pearson BTECs have earned their reputation as well-established, enduringly effective qualifications. They have a proven track record of improving motivation and achievement. Pearson BTECs also provide progression routes to the next stage of education or to employment.

What are Pearson BTEC Specialist qualifications?

Pearson BTEC Specialist qualifications are qualifications from Entry to Level 3 on the Qualifications and Credit Framework (QCF). They are work-related qualifications and are available in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment. They also provide career development opportunities for those already in work. These qualifications may be full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Some Pearson BTEC Specialist qualifications are knowledge components in Apprenticeship Frameworks, i.e. Technical Certificates.

There are three sizes of Pearson BTEC Specialist qualification in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the QCF has a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for every 10 hours of learning time
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes to the standard determined by the assessment criteria.

2 Qualification summary and key information

Qualification title	Pearson BTEC Level 3 Certificate in Principles of Hospitality Retail Outlet Management (QCF)
QCF Qualification Number (QN)	601/2487/8
Qualification framework	Qualifications and Credit Framework (QCF)
Regulation start date	09/01/2014
Operational start date	01/02/2014
Approved age ranges	18+
Credit value	16
Assessment	Centre-devised assessment (internal assessment) and Pearson-devised assessment (onscreen testing).
Guided learning hours	120
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the <i>Pearson Access and Recruitment Policy</i> (see <i>Section 10, Access and recruitment</i>).

QCF qualification number and qualification title

Centres will need to use the QCF Qualification Number (QN) when they seek public funding for their learners. Every unit in a qualification has a QCF unit reference number (URN).

The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual*, available on our website, qualifications.pearson.com

Objective of the qualification

The Pearson BTEC Level 3 Certificate in Principles of Hospitality Retail Outlet Management (QCF) is for learners who work in, or want to work in, hospitality retail outlets as team leaders and supervisors working independently without the support of a manager on site. The hospitality retail outlet team leader or supervisor will be in charge of ensuring good customer service, monitoring stock levels and dealing with all customer queries.

It gives learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised, Level 3 vocationally-related qualification
- progress to employment in the hospitality industry
- progress to related general and/or vocational qualifications.

Apprenticeships

People 1st, the sector skills council for hospitality, passenger transport, travel and tourism in the UK, have approved the Pearson BTEC Level 3 Certificate in Principles of Hospitality Retail Outlet Management (QCF) as a knowledge component for the Advanced Apprenticeship in Hospitality Retail Outlet Supervision.

Progression opportunities

Learners who achieve the Pearson BTEC Level 3 Certificate in Principles of Hospitality Retail Outlet Management (QCF) can progress to:

- Pearson BTEC Level 4 Hospitality Management qualifications
- the Higher Apprenticeship in Hospitality Management
- management roles in employment.

Industry support and recognition

This qualification is supported by People 1st.

Relationship with National Occupational Standards

This qualification relates to the National Occupational Standards in Hospitality. The mapping document in Annexe A shows the links between the units in this qualification and the National Occupational Standards.

3 Qualification structure

Pearson BTEC Level 3 Certificate in Principles of Hospitality Retail Outlet Management (QCF)

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	16
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Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	D/600/0617	Giving Customers a Positive Impression	2	2	18
2	D/502/3952	Supervision of Operations in the Hospitality Industry	3	4	28
3	L/600/1066	Principles of Supervising Customer Service Performance in Hospitality Leisure Travel and Tourism	3	2	20
4	R/503/1725	Principles of Supervising Food and Beverage Services	3	5	35
5	D/502/8309	Principles of Preparing and Serving Hot Drinks Using Specialist Equipment	2	2	10
6	L/600/1133	Dealing with Payments	2	1	9

4 Assessment

The table below gives a summary of the assessment methods used in the qualification.

Units	Assessment method
Units 1, 2, 3*, 5 and 6	Pearson-devised assessment: onscreen multiple-choice test OR portfolio of evidence
Unit 4	Centre-devised assessment: portfolio of evidence

*Partial unit assessment only for Unit 3. Assessment criteria 1.4, 2.1, 2.6 and 3.1 are not assessed by the onscreen multiple-choice test and need to be evidenced separately.

Pearson-devised assessment (external assessment)

To pass an externally assessed unit, learners must pass an onscreen test. Pearson sets and marks the test. The test writer will use the *Unit amplification* section as a guide when writing questions for the external assessments.

Further information, including details of test duration and question types is available on the web page for this qualification.

All the content in each unit that is being assessed by onscreen multiple-choice tests is mandatory. Tutors must therefore ensure that learners have covered all the content before sitting any external test, including that in brackets, which is not meant as an illustrative list, but as a prescriptive definition of the range of what must be taught.

Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all the learning outcomes. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must meet any additional requirements in the *Information for tutors* section of the unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (for example performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to give learners realistic scenarios and maximise the use of practical activities in delivery and assessment.

To avoid over-assessment, centres are encouraged to link delivery and assessment across units.

There is more guidance about internal assessment on our website. See *Section 13. Further information and useful publications*.

5 Recognising prior learning and achievement

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Further guidance is available in our policy document *Recognition of Prior Learning Policy and Process*, available on our website, qualifications.pearson.com

Credit transfer

Credit transfer describes the process of using a credit or credits awarded in the context of a different qualification or awarded by a different awarding organisation towards the achievement requirements of another qualification. All awarding organisations recognise the credits awarded by all other awarding organisations that operate within the QCF.

If learners achieve credits with other awarding organisations, they do not need to retake any assessment for the same units. The centre must keep evidence of credit achievement.

6 Centre resource requirements

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

General resource requirements

- 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 occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies in place relating to the use of equipment by learners.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 10, Access and recruitment* and *Section 11, Access to qualifications for learners with disabilities or specific needs*. For full details on the Equality Act 2010, please go to www.legislation.gov.uk

7 Centre recognition and approval

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver BTEC qualifications is given on our website, qualifications.pearson.com

Approvals agreement

All centres are required to enter into an approval agreement that is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any associated codes, conditions or regulations. Pearson will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC Apprenticeship ('single click' registration):
 - two visits per year by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions, as dictated by the *Work-Based Learning BTEC Apprenticeship Quality Assurance Handbook*.
- 2 Delivery of the qualification outside the Apprenticeship:
 - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
 - Lead Internal Verifier accreditation – this involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Pearson Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, each year we will allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details please see the *UK Vocational Quality Assurance Handbook* on our website, qualifications.pearson.com

9 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full time, part time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Where a unit is externally assessed, it is essential that learners have covered all of the Unit amplification before they are tested.

Centres must make sure that any legislation taught is up to date.

10 Access and recruitment

Pearson's policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications.

Centres are required to recruit learners to Pearson BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11, Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to 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 from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

For learners with disabilities and specific needs, the assessment of their potential to achieve the qualification must identify, where appropriate, the support that will be made available to them during delivery and assessment of the qualification. Please see the information on reasonable adjustments and special consideration in *Section 4, Assessment*.

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

12 Units

Units have the following sections.

Unit title

The unit title is on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

QCF level

All units and qualifications within the QCF have a level assigned to them. There are nine levels of achievement, from Entry to Level 8. The QCF Level Descriptors inform the allocation of the level.

Credit value

When a learner achieves a unit, they gain the specified number of credits.

Guided learning hours

Guided learning hours are the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim for a programme. This definition covers lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes assessment by staff where learners are present. It does not include time spent by staff marking assignments or homework where the learner is not present.

Unit aim

This gives a summary of what the unit aims to do.

Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

Unit amplification

This section clarifies what a learner needs to know to achieve a learning outcome.

Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections.

- *Delivery* – explains the content’s relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.
- *Suggested resources* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Giving Customers a Positive Impression

Unit reference number: D/600/0617

QCF level: 2

Credit value: 2

Guided learning hours: 18

Unit aim

The aim of this unit is for learners to develop the knowledge to communicate with customers and give a positive impression of themselves and an organisation.

Unit introduction

The hospitality industry needs staff who understand the needs and expectations of their customers, and provide them with the best possible level of service and care. Creating and giving a positive impression to customers is vital for a business to succeed. Communicating with customers using appropriate personal and social skills is important when providing products and services. Customers want to deal and interact with people with these skills, and businesses want their staff to promote a positive impression of themselves and the business.

In this unit, learners will develop and broaden their knowledge and understanding of how to establish positive working relationships with customers in hospitality businesses. They will identify the importance of the correct appearance, behaviour and standards, and describe the benefits to customers and businesses of achieving this. Tutors can draw on learners' own experiences of customer care and service to support discussions and role play/case studies.

Learners will explore and develop their awareness of the legal frameworks and codes of practice associated with providing products and services. They will find out about customer rights and contractual agreements, and their importance to the customer and the business.

Learners will look at different communication methods, and when they are appropriate to use. Learners will gain experience of promoting a positive impression to different types of customer and in varied customer service situations. They will have the opportunity to put their skills into practice through realistic working environments, role play or work experience. Receiving and discussing feedback from these situations is essential to give learners suggestions as to how to improve the way they deal with customers. Learners can then ensure they create a positive impression and have a positive impact on their business.

Essential resources

For this unit, learners need access to and support from managers and staff of external hospitality businesses.

A selection of contemporary hospitality books and journals, together with copies of media reports, accessible via electronic links to relevant websites, and case studies would also be useful learning materials.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to establish positive relationships with customers	1.1	Identify the importance of correct appearance and behaviour	<ul style="list-style-type: none"> □ <i>Appearance and behaviour:</i> improving customer satisfaction; increasing customer spending; increasing profitability; personal presentation (clean and smart uniform, personal hygiene, minimal jewellery, discreet perfume, clean hair (tied back if long), discreet make-up); body language (posture, facial expressions, smile, eye contact); attitude (polite, helpful, courteous)
		1.2	Describe the importance of recognising customer needs and expectations	<ul style="list-style-type: none"> □ <i>Customer needs and expectations:</i> improve customer satisfaction; providing information and advice; special requests (access, diet, celebration, medical); providing assistance; dealing with customer problems
		1.3	State the importance of product knowledge when relating to customers	<ul style="list-style-type: none"> □ <i>Product knowledge:</i> improving customer satisfaction (reliable service, repeat business, recommendations); increasing customer spending; increasing profitability; products and services (upselling); providing information and advice; promotions; dealing with complaints; reputation
		1.4	Identify signs of when a customer is angry or confused	<ul style="list-style-type: none"> □ <i>Angry or confused customers:</i> angry (short tempered, loud, aggressive, violent, sarcastic, body language, facial expressions, bad language, tone of voice); confused (body language, facial expressions)

Learning outcomes		Assessment criteria		Unit amplification
2	Understand why organisations have standards and procedures	2.1	Describe the legal frameworks by which organisations provide goods and services to customers	<ul style="list-style-type: none"> □ <i>Legal frameworks:</i> Health and Safety at Work Act 1974; Consumer Credit Act 1974; Equality Act 2010; Data Protection Act 1998; Consumer Protection Act 1987; Consumer Rights Act 2015
		2.2	State the importance of contractual agreements that customers have with organisations	<ul style="list-style-type: none"> □ <i>Customer contractual agreements:</i> protecting customer rights (consumer protection legislation); customer confidence (restaurant bookings, accommodation bookings); methods of payments (cash, cheque, credit and debit cards, travellers cheques, foreign currency)
		2.3	State the importance of codes of practice and standards that affect the way products and services are delivered to customers	<ul style="list-style-type: none"> □ <i>Codes of practice and standards:</i> promoting business's reputation and ensuring good service (codes of practice, customer care policy, service level agreements, service standards, complaints procedure, customer charter); ethical standards (recycling, organic and local produce, energy and water use)
3	Know how to communicate information to customers	3.1	State why there are limits to an individual's responsibilities when dealing with customers	<ul style="list-style-type: none"> □ <i>Individual responsibilities:</i> protecting individuals (reduce conflicts, civil litigation, costs); protecting the business (civil litigation, costs); business standards
		3.2	State the importance of clear, polite and confident communication	<ul style="list-style-type: none"> □ <i>Communication:</i> customer satisfaction (repeat business, recommendations, reputation); increasing revenue and profitability; reducing misunderstandings; confidence in service
		3.3	Identify different methods of communication	<ul style="list-style-type: none"> □ <i>Methods of communication:</i> verbal (face to face, telephone); non-verbal; body language; written (letters, notes, messages, email, SMS)
		3.4	Describe when the different methods of communication are used	<ul style="list-style-type: none"> □ <i>Use of communication methods:</i> telephone (enquiries, bookings, follow-up calls, promotions, complaints, room service); face to face (enquiries, bookings, feedback, taking orders); written (bookings, feedback, promotions, complaints); email (enquiries, bookings, feedback, promotions, complaints); SMS (bookings, promotions); body language (greeting, listening, welcoming, calming, smiling)

Information for tutors

Delivery

This unit introduces learners to the knowledge needed to communicate effectively with customers and promote a positive impression. Learners need an understanding of how to establish relationships with different types of customer and the correct procedures to follow. Dealing appropriately with varied customer situations and understanding the relevant legal frameworks are essential aspects of this unit.

Tutors can deliver the legal frameworks, contractual agreements and codes of practice through lectures and presentations. However, group research, discussions and learner presentations would be beneficial to help learners understand these concepts. Tutors can use case study materials to highlight key areas and issues.

Guest speakers could deliver presentations on the standards and procedures used in their workplace and their importance in ensuring customer satisfaction.

For learners to understand and appreciate customer needs and expectations, they could discuss their own experiences as customers, or any work experience where they delivered customer service. Role play and simulations can be a practical way to deliver communicating with and responding to customers. An ideal way for learners to experience being a customer, and how to communicate effectively, is through taking part in mystery shopper or mystery diner scenarios. Learners can then compare their findings through presentations and discussions. Visits to hospitality operations can give learners a broader insight into the importance of behaving appropriately towards customers and the skills required in customer service situations. Audio-visual resources can also illustrate these areas, highlighting positive and negative customer interaction situations.

Assessment

This unit can be assessed through a portfolio of evidence or by an onscreen multiple-choice test. Pearson will set and mark the test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Tutors should ensure that learners cover all the *Unit amplification*.

Suggested resources

Textbooks

Bailey K and Leland K – *Customer Service in an Instant* (Career Press, 2008)
ISBN 9781601630131

Barth S – *Hospitality Law: Managing Legal Issues in the Hospitality Industry, 3rd Edition* (John Wiley and Sons, 2008) ISBN 9780470083765

Mead T, Holmes S, Wilson P, Batten S, Richer W, Dale G, Ingle S, Neild C, Neild M and Ovenden F – *BTEC Level 2 First in Hospitality Student Book* (Pearson Education, 2011) ISBN 9780435026592

Williams A – *Understanding the Hospitality Consumer* (Butterworth-Heinemann, 2002) ISBN 9780750652490

Journals

Caterer and Hotelkeeper – Reed Business Information

Customerfirst– Institute of Customer Service

Hospitality – Reed Business Information

Videos and DVDs

Fawlty Towers (Series 1 and 2) – BBC

The Hotel Inspector – Channel 5

Websites

www.bha.org.uk – British Hospitality Association

www.caterer.com – *Caterer and Hotelkeeper* magazine

www.devere.co.uk/ – De Vere hotels

www.hilton.co.uk – Hilton hotels

www.instituteofhospitality.org –Institute of Hospitality, professional body for hospitality, leisure and tourism industries

www.instituteofcustomerservice.com – Institute of Customer Service

www.marriott.co.uk – Marriott hotels

www.ruthwatson.co.uk – website of hotelier and restaurateur Ruth Watson

Unit 2: Supervision of Operations in the Hospitality Industry

Unit reference number: D/502/3952

QCF level: 3

Credit value: 4

Guided learning hours: 28

Unit aim

The aim of this unit is for learners to develop the knowledge required to supervise hospitality operations. The unit includes an introduction to the principles of supervising customer service in the hospitality industry, and the importance of effective stock controls and resource utilisation in hospitality businesses.

Unit introduction

The effective supervision of teams is critical to the success of a hospitality business. Supervisors manage people who create products and/or perform services for customers. How well staff perform does depend on how they are supervised. Supervisors are also responsible for meeting the needs of their employer and they help to ensure this by motivating and stimulating their staff. The hospitality industry relies on staff working in different types of team. Supervisors need to understand the composition and structure of these teams.

Learners will explore different customer groups. Learners will look at the benefits of good customer service, complaint handling and monitoring, as well as improving standards in hospitality businesses.

Learners will then examine the importance of supervising stocks and using resources efficiently.

On completion of the unit, learners will appreciate the vital role supervisors play in a hospitality context.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand customer service supervision	1.1	Describe different customer groups	<ul style="list-style-type: none"> □ <i>Customer groups:</i> internal (front of house, back of house, support staff); external (individuals, groups, business travellers, very important people (VIPs), corporate, people with young children); with specific needs (mobility impairments, sensory problems, dietary requirements); different cultures; non-English speakers
		1.2	Explain the benefits of good customer service to: <ul style="list-style-type: none"> - colleagues - customers/clients - the organisation 	<ul style="list-style-type: none"> □ <i>Benefits of good customer service:</i> colleagues (positive working environment, rewards); customers (good reputation, loyal customers, repeat customers, referrals); the business (good reputation, loyal customers, increased profitability, staff retention)
		1.3	Describe ways in which service standards can be internally and externally monitored effectively	<ul style="list-style-type: none"> □ <i>Internal and external monitoring of service standards:</i> customer feedback (surveys, questionnaires, suggestion cards, informal comments, complaints, staff suggestions); financial data (turnover, repeat business); competitor activity (comparison with competitor products or services, mystery shoppers)
		1.4	Describe ways of improving customer service	<ul style="list-style-type: none"> □ <i>Improving customer service:</i> operation (efficiency, staffing levels, staff training); customer care policy (introducing an employee of the month award); to products and services offered (quality, range, price, loyalty schemes)
		1.5	Describe how to deal with unsatisfactory customer experiences	<ul style="list-style-type: none"> □ <i>Unsatisfactory customer experiences:</i> policy and systems in place (identifying problems); remedial actions (positive response, apologising, listening, rectifying the problem, informing customer, offering compensation, checking customer is comfortable with actions taken, staff training)

Learning outcomes		Assessment criteria		Unit amplification
		1.6	Outline ways to promote a customer service culture within a team	<ul style="list-style-type: none"> □ <i>Customer service culture</i>: leading by example (commitment to excellent customer service, sharing enthusiasm); teamwork; team formation; team roles (front of house and back of house); support and guidance to team; encouraging the team; differing characteristics of team members; delegation; lines of authority; mentoring
2	Understand the principles of stock control	2.1	State key types of supplies available to a supervisor	<ul style="list-style-type: none"> □ <i>Key types of supplies</i>: produce (perishables, non-perishables, alcoholic, non-alcoholic, equipment, cleaning materials)
		2.2	Describe stock ordering processes	<ul style="list-style-type: none"> □ <i>Stock ordering processes</i>: levels of stock ordering; bar coding; sources of supply (contract purchasing, purchasing by tender, centralised purchasing, from market list or quotation, cash-and-carry outlet, wholesaler, retail outlet, website); stages in the process (requisition, purchase specification, quotation, purchase order, receipt of goods, invoicing, payment)
		2.3	Describe procedures for receiving stock	<ul style="list-style-type: none"> □ <i>Procedures for receiving stock</i>: checking (quality of supplied stock, delivery note, goods received note, returns, credit notes, invoicing); storing in appropriate place (fresh produce in fridge, temperature controls); refusal of stock; processing of records; reporting of wastage and contamination
		2.4	Explain the principles of storing stock	<ul style="list-style-type: none"> □ <i>Principles of storing stock</i>: special conditions (hygiene and food safety legislation, preventing deterioration, preventing cross-contamination, preventing infestation); cost of storage (space utilisation); security
		2.5	Describe the factors that influence stock levels in a hospitality organisation	<ul style="list-style-type: none"> □ <i>Factors that influence stock levels</i>: seasonal (Christmas, Easter); systems (regular stock counts, recording stock counts, stock rotation, stock valuation, bin cards, costed issue sheets); depreciation period; annual audit; theft; calculating stock value (First in First Out (FIFO), Last in First Out (LIFO)); costed recipes; portion control; yields and standard costs
		2.6	Describe how to monitor use of stock to avoid wastage and to maintain sufficient levels	<ul style="list-style-type: none"> □ <i>Monitoring stock use</i>: following relevant legislation (First in First Out (FIFO), Last in First Out (LIFO), regular stock checks, regular audits)

Learning outcomes		Assessment criteria		Unit amplification
		2.7	Explain the financial and operational impacts of not maintaining the correct levels of stock	<ul style="list-style-type: none"> □ <i>Financial and operational impact:</i> financial accountability procedures; quantity of stock; damaged goods; highlighting discrepancies; security (staff vigilance, management controls, identifying problem areas); visual checks
3	Understand how to use resources effectively	3.1	Describe how to use key types of supplies cost effectively	<ul style="list-style-type: none"> □ <i>Key types of available supplies:</i> produce (perishable and non-perishable, alcoholic and non-alcoholic beverages, equipment, consumables); suppliers and supplies; monitor stock levels
		3.2	State the importance of encouraging others to use supplies efficiently	<ul style="list-style-type: none"> □ <i>Using supplies efficiently:</i> consumption levels for resources; audits; stock rotation; monitoring use of supplies; minimising waste; in line with business procedures
		3.3	Explain the need to maintain appropriate staffing levels	<ul style="list-style-type: none"> □ <i>Appropriate staffing level:</i> staffing levels to meet business demand (quite periods, busy periods); staff planning; rosters; business level indicators (reservations, year, forecasts); staff skills (skill level against business needs)

Information for tutors

Delivery

It is expected that learners will already have an awareness or practical knowledge of the operational skills required in the hospitality industry.

A visit to a large hospitality business, for example a hotel, will enable learners to put their understanding of the unit content into a vocational context.

For learning outcome 1, learners will explore how different hospitality businesses deal with different customer groups. They need to understand the use of service standards within these different businesses. Learners also need to understand the different types of customer groups and how good customer service impacts on these groups. Learners will identify how to improve customer service and resolve customer complaints. In addition, they will examine how teams can work together to provide good customer service. Case studies, scenarios and recent media reports illustrating real life incidents, would be useful in adding to the vocational relevance for learners.

For learning outcome 2, learners will explore the procedures associated with supplying resources to a business. Learners could carry out stock control procedures in a simulated or real environment in order to understand the reasons for control measures. Learners need to understand the financial implications of stock control and the impact of wastage.

Work experience may give learners an in-depth understanding of the procedures that are used in a hospitality business.

For learning outcome 3, learners will consider how to obtain resources effectively. They will examine the process of stock rotation, wastage limiting procedures and the need to use supplies efficiently. Learners will explore the need to plan staffing levels to meet business needs by preparing rosters for case studies.

Assessment

This unit can be assessed through a portfolio of evidence or by an onscreen multiple-choice test. Pearson will set and mark the test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Learning outcome 2 should consider refusal of stock, processing of records and reporting of wastage and contamination in terms of receiving stock.

All the content in each unit that is being assessed by onscreen multiple-choice tests is mandatory. Tutors must therefore ensure that learners have covered all the content before sitting any external test, including that in brackets, which is not meant as an illustrative list, but as a prescriptive definition of the range of what must be taught.

Suggested resources

Textbooks

Campbell J, Foskett D and Ceserani V – *Practical Cookery, 11th Edition* (Hodder Education, 2008) ISBN 9780340948378

Foskett D and Ceserani V – *The Theory of Catering, 11th Edition* (Hodder Education, 2007) ISBN 9780340939260

Journals

Caterer and Hotelkeeper – Reed Publications

Hospitality Today – Special Publishing

Websites

www.bha.org.uk – British Hospitality Association

www.caterer.com – *Caterer and Hotelkeeper* magazine

www.instituteofhospitality.org – Institute of Hospitality, the professional body for hospitality, leisure and tourism industries

Unit 3: Principles of Supervising Customer Service Performance in Hospitality Leisure Travel and Tourism

Unit reference number: L/600/1066

QCF level: 3

Credit value: 2

Guided learning hours: 20

Unit aim

The aim of this unit is for learners to develop an in-depth knowledge of how to supervise customer service performance in the hospitality, leisure, travel and tourism sector. The unit is appropriate for supervisors and managers whose responsibilities include managing staff.

Unit introduction

Effective customer service is of vital importance to all businesses within hospitality, leisure, travel and tourism. A reputation for providing excellent customer service will help businesses to attract and retain customers by differentiating them from their competitors. Supervisors play an important role in ensuring the continuity of an effective and positive customer service culture within a business.

This unit looks at how supervisors can help to develop customer service in their business, the relationship between customer service and selling, and the impact that excellent customer service can have on business performance.

Learners will explore the role of the supervisor in providing customer service and in building teams that can deliver effective customer service. The importance of staff development, training, coaching, and different methods of giving feedback in relation to customer service is also explored. Finally, learners will investigate the effectiveness of customer service in a business by measuring it against customer service standards and suggesting improvements.

On completion of this unit, learners will appreciate the vital role they play, as supervisors or potential supervisors in the hospitality, leisure, travel and tourism sector, in contributing to high quality customer service.

Essential resources

It is essential that learners have the opportunity to gain an understanding of the hospitality, leisure, travel and tourism sector. This may be through work placements, employment, visits or interviews with industry spokespeople.

Learners should have access to IT resources for research and to produce written work and presentations. Video cameras could be used to record any evidence.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to develop a customer service culture within their business	1.1	Describe the role of the supervisor in leading by example when delivering excellent customer service	<ul style="list-style-type: none"> □ <i>Role of the supervisor:</i> leading a team; demonstrating good customer service skills (personal presentation, knowledge of products and services, communication and listening skills); team goals; positive attitude
		1.2	Explain the impact of customer service on the performance of the business	<ul style="list-style-type: none"> □ <i>Customer service and business performance:</i> business objectives (customer loyalty, repeat business, increased sales and usage, enhanced public image, new customers)
		1.3	Explain the relationship between delivering customer service and selling services	<ul style="list-style-type: none"> □ <i>Customer service and selling:</i> product knowledge; providing information or advice; identifying, meeting and exceeding customer needs
		1.4	Identify and apply good practice techniques to monitor the delivery of customer service against organisational standards	<ul style="list-style-type: none"> □ <i>Monitoring delivery of customer service:</i> business standards; monitor customer loyalty (repeat business, new customers); enhanced public image; customer satisfaction; techniques (mystery shoppers, comment cards, observation)
2	Understand how to build teams and motivate colleagues through techniques such as on-site coaching	2.1	Analyse how effective teams can be developed to deliver excellent customer service	<ul style="list-style-type: none"> □ <i>Developing effective teams:</i> recruitment; induction; motivation; training; team goals; team knowledge; retention of team members; threats to team development (high team-member turnover, weak or authoritarian leadership, poorly-defined goals)
		2.2	Explain the importance of staff development in ensuring that excellent customer service is delivered	<ul style="list-style-type: none"> □ <i>Importance of staff development:</i> planning; team knowledge (awareness of team member strengths, weaknesses and sensitivities); appraisals

Learning outcomes		Assessment criteria		Unit amplification
		2.3	Describe the role of the supervisor in developing teams	<ul style="list-style-type: none"> □ <i>Role of the supervisor:</i> ability to motivate and lead a team; ability to take initiative; ability to defuse and resolve conflict; fairness in decision making
		2.4	Describe how training and coaching sessions can be implemented to improve the delivery of customer service	<ul style="list-style-type: none"> □ <i>Implementation of training and coaching:</i> to improve customer service; group or individual training (on-site or off-site); individual on-site coaching
		2.5	Describe the importance of providing feedback to staff	<ul style="list-style-type: none"> □ <i>Importance of providing feedback:</i> to motivate team members; maintain team focus
		2.6	Apply appropriate methods to deliver feedback to staff	<ul style="list-style-type: none"> □ <i>Methods of providing feedback:</i> meetings; staff appraisal; staff newsletter; email
3	Understand how to effectively monitor and communicate levels of customer service performance	3.1	Analyse the importance of developing and implementing clear customer service standards	<ul style="list-style-type: none"> □ <i>Importance of customer service standards:</i> important for customers, potential customers, employees and supervisors; defining what customers can expect; reminding supervisors and employees of their duties
		3.2	Describe appropriate ways in which supervisors can monitor and measure the performance of team members	<ul style="list-style-type: none"> □ <i>Monitoring and measuring team performance:</i> customer feedback (surveys, informal comments, complaints); financial data (turnover, repeat business); team objectives
		3.3	Describe appropriate corrective actions that can be taken to resolve failures in the delivery of customer service	<ul style="list-style-type: none"> □ <i>Corrective action:</i> support and development of underperforming team members; revising team responsibilities; reviewing and evaluating team working arrangements

Learning outcomes		Assessment criteria		Unit amplification
		3.4	Explain how performance against customer service standards can be recorded and communicated	<ul style="list-style-type: none"> □ <i>Recording and communicating performance:</i> performance set at staff appraisal; self-evaluation; standards checklist; customer feedback; communicating about performance (appraisal interview); team meetings
		3.5	Identify ways in which measurement of the effectiveness of customer service can be used to improve future performance	<ul style="list-style-type: none"> □ <i>Improving future performance:</i> of the operation (efficiency, staff training, staff levels, employee of the month scheme); of the products and services offered (quality, range, price, loyalty scheme assessment criteria)

Information for tutors

Delivery

Delivery of this unit needs to focus on learners sharing their experience in classroom discussions and group work. Investigating how businesses develop the quality of their customer service provision will put the unit into context for learners who may have different experiences of customer service. Company websites are a good way of looking at how companies portray themselves to customers.

A visit to the training department of a large business could give learners relevant and up-to-date information on training and staff development issues. Having copies of customer service standards used by companies available for learners would be useful when discussing business standards and how the delivery of customer service could be monitored.

Although the unit is largely theoretical, learners could be given the opportunity to develop their presentation skills, or see themselves on video when giving feedback to colleagues/team members in a role-play situation, for example at a team meeting or on an individual basis.

Learners could look at examples of how different businesses monitor and communicate customer service performance. While learner experience is relevant, a guest speaker from the industry could provide a managerial perspective on the subject.

In this unit, learners have the opportunity to consider their own experience as a customer or supervisor who deals with customers, such as their own role within the business and how their behaviour, communication and leadership can impact on customer service performance, either negatively or positively.

As a result, learners can reflect on how they could improve their behaviour, communication and leadership skills in order to improve overall customer service within the business.

Assessment

This unit can be assessed through a portfolio of evidence or by an onscreen multiple-choice test*.

Pearson will set and mark the test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Tutors should ensure that learners cover all the *Unit amplification*.

*Partial assessment of the following assessment criteria will be covered by the onscreen test: 1.1, 1.2, 1.3, 2.2, 2.3, 2.4, 2.5, 3.2, 3.3, 3.4 and 3.5.

Assessment criteria 1.4, 2.1, 2.6 and 3.1 are not assessed by the test and need to be evidenced via other methods. The centre will devise and mark the assessment for this unit.

Suggested resources

Textbooks

Campbell J, Foskett D and Ceserani V – *Practical Cookery, 11th Edition* (Hodder Education, 2008) ISBN 9780340948378

Foskett D and Ceserani V – *The Theory of Catering, 11th Edition* (Hodder Education, 2007) ISBN 9780340939260

Mead T, Holmes S, Wilson P, Batten S, Richer W, Dale G, Ingle S, Neild C, Neild M and Ovenden F – *BTEC Level 2 First in Hospitality Student Book* (Pearson Education, 2011) ISBN 9780435026592

Journals

Caterer and Hotelkeeper – Reed Business Information

Waitrose Kitchen – available in Waitrose supermarkets

Websites

www.bbc.co.uk/learningzone – BBC Learning Zone

www.bha.org.uk – British Hospitality Association

www.caterersearch.com – Caterersearch – hospitality news

www.catersource.com – Catersource – education, products and news for caterers

www.people1st.co.uk – People 1st – Sector Skills Council for hospitality, passenger transport, travel and tourism

Unit 4: Principles of Supervising Food and Beverage Services

Unit reference number: R/503/1725

QCF level: 3

Credit value: 5

Guided learning hours: 35

Unit aim

This unit aims to give learners the knowledge and understanding needed to supervise the food and beverage service, including how to manage the environmental impact of work and how to contribute to the management of finance.

Unit introduction

This unit introduces learners to food and beverage service supervision. Appropriate supervision ensures effective workflow within teams, while considering the importance of managing the environmental impact and financial aspects of food and beverage operations.

In this unit, learners will look at the role of the food and beverage service supervisor. This will include e communication methods used within teams, how to give feedback to team members and the importance of conducting briefings. Learners will look at how to motivate individual employees and teams to achieve the required quality standards. Understanding monitoring activities will enable learners to judge performance against standards and targets and decide on the action necessary if these are not met.

Learners will consider how to manage the environmental impact of food and beverage operations. The environmental policies that impact on food and beverage operations and the risks posed by the food and beverage operation to the environment are a significant part of the unit. Learners will explore how to minimise the negative and maximise the positive impact that resources can have on the environment. Learners will explore the management of finance in food and beverage operations. They will learn the meaning of gross and net profit and look at what makes an organisation profitable, including the factors that must be monitored to control costs and maximise profit.

There is no requirement to prepare and serve alcoholic drinks as part of the assessment. Learners who are under the legal minimum age for the retail purchase of alcoholic beverages in the country where the qualification is being taken will not be allowed to sample any alcoholic beverage as part of their course, but this is not a barrier to successfully completing the qualification. Similarly, learners who choose not to taste alcohol for health, religious or other reasons will not find this a barrier to completing the qualification successfully.

Essential resources

Learners should have access to food and beverage operation environments.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the role of the food and beverage service supervisor	1.1	Describe communication methods used within teams in food and beverage service	<ul style="list-style-type: none"> □ <i>Communication methods used within teams:</i> verbal, e.g. tone of voice, appropriate language; non-verbal e.g. posture, facial expressions; written conventions, e.g. correct layout, accurate spelling, grammar and punctuation; appropriate to audience, e.g. colleague, manager, customer
		1.2	Explain when it is appropriate to communicate with team members using the following methods: <ul style="list-style-type: none"> ● verbal instructions/demonstrations ● written instructions/demonstrations ● pictures/diagrams 	<ul style="list-style-type: none"> □ <i>Appropriate communication with team members using specific methods:</i> verbal instructions/demonstrations – communicating using spoken words, e.g. face to face, by telephone – effectiveness depends on the clarity of speech, pitch, volume, speed, body language; written instructions/demonstrations – communicating using, e.g. traditional letters, emails, handbooks, brochures, formal business proposals – effectiveness depends on the writing style, grammar, vocabulary, clarity, language and the recipients; pictures/diagrams – communicating through visual aids, e.g. signs, symbols, drawing, graphic design
		1.3	Explain appropriate times to give feedback to team members	<ul style="list-style-type: none"> □ <i>Appropriate times to give feedback to team members:</i> appropriate times, e.g. providing positive feedback immediately, providing negative feedback privately, providing positive feedback publicly, meetings, staff appraisal, staff newsletter, email, being specific, being honest maintaining team focus, times for feedback (considering tiredness, time of day, during and post-service)

Learning outcomes		Assessment criteria	Unit amplification
		1.4 Explain how to give constructive feedback to team members on performance	<ul style="list-style-type: none"> □ <i>Giving feedback to team members on performance:</i> giving feedback, e.g. planning what to say and how it will be said, praising by focusing on the positives first and offering feedback on what can be improved, giving constructive feedback clearly and concisely, adopting an appropriate approach to each recipient, focusing towards solutions by giving them the confidence to solve problems and resolve situations that have arisen and supporting them to do this, following up by agreeing actions required and scheduling a follow-up meeting to discuss progress as a result of the feedback
		1.5 Explain the importance of conducting briefings – pre-service – post-service	<ul style="list-style-type: none"> □ <i>Importance of conducting pre-service briefings:</i> importance, e.g. providing information before the start of service, going over service standards and encouraging team members to ask questions regarding service and food and drink knowledge, confirming duties, motivating team members □ <i>Importance of conducting post-service briefings:</i> importance, e.g. assessing if objectives and service targets have been achieved, giving individuals or team the opportunity to talk about their experience, discussing how they managed to carry out their duties, identifying individuals in need of support, giving support and monitoring their future performance
		1.6 Explain how briefings should be conducted	<ul style="list-style-type: none"> □ <i>Conducting briefings:</i> briefings, e.g. setting objectives and service standards (informing team members of internal and external factors, motivating, delegating, professional appearance, food and drink testing), encouraging team members to ask questions regarding service and food and drink knowledge, starting on time, ensuring that everybody is on time and present, informing team members about 'specials' and any VIP customers, informing team members of items not in stock, body language

Learning outcomes		Assessment criteria		Unit amplification
		1.7	Explain how to motivate teams to achieve the required standards of quality	<ul style="list-style-type: none"> □ <i>Motivating teams to achieve quality standards:</i> motivating eg ensuring quality standards are communicated and understood, identifying any problems (such as understanding why team members are not, talking to individuals in private specifying unmotivated behaviour and the effect it has on team objectives), involving team members (such as increasing responsibility, allowing team members to find creative solutions to problems), following formal routes (such as informing unmotivated team members of the consequences of undesirable behaviour), setting an example (such as dedication and energy, increasing team members' commitment to the business goal and turning unmotivated team members into an enthusiastic team)
		1.8	Explain how to motivate individuals to achieve the required standards of quality	<ul style="list-style-type: none"> □ <i>Motivating individuals to achieve quality standards:</i> motivating, e.g. giving team members significant goals and using performance measures to focus their thinking and work and providing regular sense of accomplishment, encouraging creativity in developing better ways to achieve the goal, quick response required to provide fast feedback so team members can improve and adapt, giving rewards, development and promotion opportunities
		1.9	Explain how to monitor activities and performance against standards and targets	<ul style="list-style-type: none"> □ <i>Monitoring activities and performance against standards and targets:</i> monitoring, e.g. observing and assessing the performance of individuals and teams against set standards and targets, customer feedback, financial data, competitor activity
		1.10	Explain the action to be taken if activities and performance do not meet organisational standards and targets	<ul style="list-style-type: none"> □ <i>Action to be taken if activities and performance do not meet standards and targets:</i> actions, e.g. investigating to establish cause, supporting and developing under-performing team members, reviewing team responsibilities, re-evaluating team working arrangements

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to manage the environmental impact of food and beverage operations	2.1	Explain the environmental policies that impact food and beverage operations	<ul style="list-style-type: none"> □ <i>Food</i>: types, e.g. canapés and other appetisers/starters, soups, egg dishes, pasta and rice dishes, fish, meats, poultry, game, vegetables, salads and dressings, accompaniments, sauces, cold buffet, cheese, sweets, savoury, dessert fruit □ <i>Beverages</i>: types, e.g. bottled, draught, drinks in cans, drinks in cartons, free pouring/optics, alcoholic and cold non-alcoholic drinks, coffee, hot chocolate, tea, steamed milk drinks, iced drinks (e.g. frappé/iced tea) □ <i>Environmental policies that impact food and beverage operations</i>: as current at time of delivery; policies, e.g. Environmental Protection Act 1990 (including any amendments made to the Act), Waste (England and Wales) Regulations 2011, The Hazardous Waste (England and Wales) Regulations 2005, Environmental Protection (Duty of Care) Regulations 1991, The Control of Pollution (Amendment) Act 1989
		2.2	State the risks posed by the food and beverage operation to the environment	<ul style="list-style-type: none"> □ <i>Risks posed by food and beverage operations to the environment</i>: risks, e.g. rapid growth of algae and bacteria due to release of untreated wastes to surface waters resulting in reduction of oxygen supply and destroying fish populations, greenhouse gas emissions, litter and waste production, water and energy use
		2.3	Explain how to minimise the negative impact resources may have on the environment	<ul style="list-style-type: none"> □ <i>Minimising the negative impact resources may have on the environment</i>: minimising impact, e.g. reducing emissions, complying with environmental regulations, improving resource efficiency, minimising negative environmental, social and economic impacts, recycling
		2.4	Explain how to maximise the positive impact resources may have on the environment	<ul style="list-style-type: none"> □ <i>Maximising the positive impact resources may have on the environment</i>: maximising positive impact, e.g. environmental awareness, effective planning, maximising positive environmental, social and economic impacts, encouraging use of renewable resources, generating economic benefits for local people, involving local people in decisions that affect their lives

Learning outcomes		Assessment criteria		Unit amplification
		2.5	Describe ways in which energy use may be minimised	<ul style="list-style-type: none"> □ <i>Minimising energy use:</i> energy use, e.g. promoting energy efficiency and reducing carbon emissions, monitoring and recording emissions from energy use, minimising non-sustainable energy use, low energy consumption equipment, timed and proximity lighting
		2.6	Explain sustainability considerations when ordering stock	<ul style="list-style-type: none"> □ <i>Sustainability considerations when ordering stock:</i> considerations, e.g. costs and benefits, locally-sourced seasonal products, ability to repeat without reducing resources, recycling, saving energy and reducing waste, screening supplies to ensure they are ethically sound, minimal food miles, using refillable dispensers, eco-friendly equipment and products, reduction of carbon footprint, carbon offsetting
		2.7	Explain how to engage the team in sustainability activities	<ul style="list-style-type: none"> □ <i>Engaging the team in sustainability activities:</i> activities, e.g. identifying opportunities, agreeing targets and implementing specific solutions to help the business operate in a more environmentally sustainable way, educating/raising awareness, cost savings by integrating energy efficiency into the workplace and products and services, engaging the team to capture ideas, communicating and sharing best practices, giving feedback on progress and achievements
3	Understand how to contribute to the management of finance in the food and beverage operation	3.1	Define the term gross profit	<ul style="list-style-type: none"> □ <i>Gross profit:</i> definition, e.g. profit after selling a product or service and deducting the cost associated with its production and sale
		3.2	Define the term net profit	<ul style="list-style-type: none"> □ <i>Net profit:</i> definition, e.g. the gross profit minus overheads minus interest payable for a given time period
		3.3	Explain what makes an organisation profitable	<ul style="list-style-type: none"> □ <i>What makes an organisation profitable:</i> profitability, e.g. innovation management and stimulation (of products (new, improved products/services, business levels), processes (improvement, efficiency), position (customers' perception), change (ways things are done)), brand/image, secret, special or proprietary ingredients, excellent customer service

Learning outcomes		Assessment criteria		Unit amplification
		3.4	Explain the importance of using approved suppliers	<ul style="list-style-type: none"> □ <i>Importance of using approved suppliers:</i> importance, e.g. ensuring quality of supplies, ensuring quality and delivery performance, consistency, building long-term supplier relationships, minimising the risk of disputes
		3.5	Explain how effective stock control can contribute to the financial stability of the organisation	<ul style="list-style-type: none"> □ Effective stock control contribution to organisations' financial stability: stock control, e.g. maintaining the balance of expenses and profits by keeping stock on hand for demands that may arise in any situation, knowing the quantity of items to be stored and implementing a good control of inventory to help maximise profits, understanding the related costs in having stock in hand, running out of stock and when to place orders to obtain the right formula and create the best inventory management scheme for the business
		3.6	Explain the factors which must be monitored to control costs and profit	<ul style="list-style-type: none"> □ <i>Factors which must be monitored to control costs and profit:</i> fixed costs, e.g. insurance, utility bills; variable costs, e.g. food and beverages, wages

Information for tutors

Delivery

This unit introduces learners to the principles of supervising food and beverage services. Supervision of food and beverage services is essential to the smooth running of many aspects of hospitality. Learners need to be aware of the importance of the role of the service supervisor, managing the environmental impact of food and beverage services and the management of finance in the food and beverage operation.

Guest speakers would help provide the industrial overview that learners need. Companies that conduct 'green audits' for business are often willing to give presentations. Organised visits to different hospitality businesses are essential in enabling learners to identify the methods of communication used by the service supervisor and how to give feedback on performance. The visits should be sufficiently varied to ensure learners can compare specific requirements for various types of business. Learners can use work-based experience to evidence particular ways to minimise the negative impact of resources on the environment and sustainable practices. Case studies would complement the work experience and assist learners in understanding the importance of using approved suppliers and effective stock control.

Learners must be supported in their research and investigations, and should be given the opportunity to discuss their findings with peers and tutors. This approach will help learners to develop their presentation and evaluation skills. Learners should have the opportunity to observe a range of workflow situations through industrial visits, to ensure they understand the implications and influences on good practice in food and beverage operations.

Assessment

The centre will devise and mark the assessment for this unit.

Learning outcome 1: could take the form of a training exercise or simulated activity to show that learners fully understand the role of the food and beverage service supervisor. Briefing notes to back this up would enable learners to familiarise themselves with communication methods, how to give feedback to team members, conduct briefings, motivate staff, and monitor activities and performance before taking part in training or simulation. Learners must use examples to demonstrate they understand the action to be taken if activities and performance do not meet organisational standards and targets.

Learning outcome 2: could be covered by learners having access to a hospitality business's environmental policies and procedures to understand how to manage the environmental impact of food and beverage services. A visit to a workplace where learners could be given scenarios of the risks posed by the food and beverage operation to the environment would enhance their understanding of how to minimise the negative impact resources may have on the environment and maximise the positive impact resources may have on the environment. A report explaining how energy use may be minimised, sustainability considerations when ordering stock and how to engage the team in sustainability activities would demonstrate a full understanding of this learning outcome.

Learning outcome 3: could be covered by producing briefing notes that enable learners to understand how to contribute to the management of finance in the food and beverage operation. Learners should carry out tasks that provide evidence explaining the factors which must be monitored to control costs and profit. A personal statement explaining what makes an organisation profitable, the importance of using approved suppliers and how effective stock control can contribute to the financial stability of the organisation must accompany the explanation. A report defining the terms 'gross profit' and 'net profit' should be included.

Learners must meet all assessment criteria to pass the unit.

Suggested resources

Textbooks

Belbin M R – *Team Roles at Work, 2nd Edition* (Butterworth-Heinemann, 2010) ISBN 9781856178006

Cousins J, Lillcrap D and Weekes S – *Food and Beverage Service, 8th Edition* (Hodder Education, 2010) ISBN 9781444112504

Leigh A and Maynard M – *Leading Your Team: How to Involve and Inspire Teams, 2nd Edition* (Nicholas Brealey, 2002) ISBN 9781857883046

Journals

Caterer and Hotelkeeper – Reed Business Information

Croner's Catering Magazine – Croner Publications

Voice of the BHA – British Hospitality Association

Websites

www.bighospitality.co.uk/Special-Features/Sustainability – Big Hospitality – feature on sustainability

www.catersource.com – Catersource – education, products and news for caterers

www.food.gov.uk – The Food Standards Agency

www.hospitalityassured.co.uk – Hospitality Assured – standard for service and business excellence

www.hse.gov.uk/catering – Health and Safety Executive

www.instituteofhospitality.org – Institute of Hospitality – professional body for hospitality, leisure and tourism industries

www.people1st.co.uk – People 1st, Sector Skills Council for hospitality, passenger transport, travel and tourism

Unit 5: Principles of Preparing and Serving Hot Drinks Using Specialist Equipment

Unit reference number: D/502/8309

QCF level: 2

Credit value: 2

Guided learning hours: 10

Unit aim

The aim of this unit is to enable learners to gain knowledge of how to prepare work areas and equipment such as espresso machines, bean grinders and cafetières, and how to prepare and serve hot drinks such as coffee, tea and hot chocolate.

Unit introduction

Good quality hot drinks offer the potential for high profit margins in hospitality businesses. The market for specialty hot drinks has grown considerably in recent years with customers expecting quality products as well as value for money.

Providing high-quality hot drinks involves a range of specific skills and abilities. Learners will be introduced to safe and hygienic working practices when preparing the work area and equipment for service, preparing and serving hot drinks and maintaining hot-drink-making equipment, and the techniques for mixing and preparing different types of beverages. They will learn about the importance of having drink ingredients and accompaniments available and ready for immediate use.

Learners will be taught about the preparation of specialist equipment such as espresso machines, bean grinders and cafétieres. They will learn about the preparation and service of hot drinks such as coffee, tea, and hot chocolate, and the importance of maintaining drink-making equipment and checking the level of stocks.

Learners will consider possible unexpected situations that might occur when preparing work areas and equipment for the preparation of hot drinks, and when preparing and serving hot drinks and maintaining hot drinks equipment.

Essential resources

Learners need access to professional and fully-equipped hot drink preparation and dispensing areas, which are kept up to date and in good order. They also need access to current resource materials and, where necessary, access to instructional materials such as DVDs, training texts, videos and online materials.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to prepare work area and equipment for service	1.1	Describe safe and hygienic working practices when preparing work area and equipment for service	<ul style="list-style-type: none"> □ <i>Safe and hygienic practices when preparing work area and equipment for service:</i> washing hands before service and at regular and frequent intervals; personal hygiene (cleanliness, appearance); staff uniform (correct and clean); safe use of physical resources (equipment, crockery, cutlery, glassware, manual handling of furniture); identifying hazards (sources of bacteria, chemical, physical); preparation equipment (espresso machine, cream whipper, knock-out box, bean grinders, filter system, caf�tiere, blender, steamer, urn); service equipment (cutlery, glassware, crockery, trays); other equipment (dishwashers, fridge/freezers, thermometers, temperature records)
		1.2	State the importance of having drink, ingredients and accompaniments available and ready for immediate use	<ul style="list-style-type: none"> □ <i>Drink, ingredients and accompaniments for hot drinks:</i> drinks (coffee, hot chocolate, tea, steamed milk drinks, iced drinks); ingredients (freshly ground coffee beans, pre-ground coffee beans, syrups, chocolate powder, milk, ice cream, spray cream, tea, ice); drink accompaniments (sugar, dusting/topping powder, cream) □ <i>Importance of having drink, ingredients and accompaniments ready for use:</i> enabling quick and efficient work; meeting customer requirements; ensuring customer satisfaction
		1.3	State the importance of checking all work areas and service equipment for damage before taking orders	<ul style="list-style-type: none"> □ <i>Importance of checking work areas and service equipment for damage before taking orders:</i> enabling quick and efficient work; meeting customer requirements; ensuring customer satisfaction

Learning outcomes		Assessment criteria		Unit amplification
		1.4	Describe the types of unexpected situation that might occur when preparing work areas and equipment for the preparation of hot drinks	<ul style="list-style-type: none"> □ <i>Unexpected situations that might occur when preparing work areas and equipment for the preparation of hot drinks:</i> shortages/breakdown of equipment; shortages/out-of-date stock; spillages; breakages unexpected customers; damage to equipment, furniture, furnishings; incorrect lay-up; incorrect menu information; pests and vermin; limit of authority; customer special requirements
2	Know how to prepare and serve hot drinks using specialist equipment	2.1	Describe safe and hygienic working practices when preparing and serving hot drinks and maintaining hot drink making equipment	<ul style="list-style-type: none"> □ <i>Safe and hygienic practices when preparing and serving hot drinks and maintaining hot-drink-making equipment:</i> correct use of equipment; correct use of glassware; washing hands before service and at regular and frequent intervals; personal hygiene (cleanliness, appearance); staff uniform (correct and clean); identifying hazards (sources of bacteria, chemical, physical)
		2.2	Describe the techniques for mixing and preparing different types of beverages	<ul style="list-style-type: none"> □ <i>Techniques for mixing and preparing different types of beverages:</i> coffee (brewing coffee by boiling, coffee percolators, automatic coffee makers, steeping in a French press, espresso method); tea (brewing tea taking into account the quality and temperature of the water, ratio of tea leaves and amount of water used, infusion time, material and shape of the vessel in which the tea infusion takes place); hot chocolate (adding hot water to chocolate mix; heating chocolate sugar and milk, cooking over medium heat, stirring continuously)
		2.3	State the importance of keeping customer and service areas clean, tidy and free from rubbish and used equipment	<ul style="list-style-type: none"> □ <i>Importance of keeping customer and service areas clean, tidy and free from rubbish and used equipment:</i> complying with food hygiene and health and safety legislation; avoiding cross-contamination; avoiding pest infestation; avoiding the risk of fire; ensuring customer satisfaction; attracting business; maintaining business standards
		2.4	Describe the types of unexpected situation that might occur when preparing and serving hot drinks and maintaining hot drinks equipment	<ul style="list-style-type: none"> □ <i>Unexpected situations that might occur when preparing and serving hot drinks and maintaining hot drinks equipment:</i> shortages/breakdown of equipment; shortages/out-of-date stock; spillages; breakages; unexpected customers; damage to equipment, furniture, furnishings; incorrect lay-up; incorrect menu information; pests and vermin; limit of authority; customer special requirements

Information for tutors

Delivery

This unit introduces learners to the principles of preparing and serving of hot drinks using specialist equipment. It underlines the importance of safe and hygienic practices when preparing and serving hot drinks and maintaining hot-drink-making equipment.

This unit can be delivered through practical activities as well as classroom and theory-based work. Tutors should introduce learners to the procedures used in preparing the work area and equipment for service of hot drinks using specialist equipment. Tutors should also introduce learners to the main types of hot drink such as coffee, tea and hot chocolate, and the equipment used in their preparation in hospitality businesses.

Learners need to know and be able to recognise the range of drink variations commonly requested by customers, the ingredients used as well as the accompaniments for each. Learners will need to be shown how to clean and check a range of specialist and other typical service equipment to the necessary standards and how to deal with a range of possible unexpected situations that can arise during the preparation and service stages.

Tutors should explain the importance of the correct procedures when dealing with equipment such as espresso machines. Learners should be shown the techniques used in the mixing and preparation of the different types of hot drink offered in hospitality businesses.

Group discussions will help learners to develop their knowledge of why keeping customer and service areas clean, tidy and free from rubbish and used equipment is essential to the efficient and effective service of hot drinks using specialist equipment.

Assessment

This unit can be assessed through a portfolio of evidence or by an onscreen multiple-choice test. Pearson will set and mark the test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Tutors should ensure that learners cover all the *Unit amplification*.

Suggested resources

Textbooks

Cousins J and Lillicrap D – *Essential Food and Beverage Service (Levels 1 and 2)* (Hodder Education, 2010) ISBN 9781444112528

Rao S – *The Professional Barista's Handbook : An Expert Guide to Preparing Espresso, Coffee and Tea* (Scott Rao 2008) ISBN 9781605300986

Schapira J, Schapira D and Schapira K – *The Book of Coffee and Tea: A Guide to the Appreciation of Fine Coffees, Teas and Herbal Beverages, 2nd Edition* (Macmillan, 1996) ISBN 9780312140991

Journal

Caterer and Hotelkeeper – Reed Business Information

Websites

www.associatedcontent.com/article/5498496/beginners_guide_to_starbucks_espresso.html?cat=22 – Associated Content, beginner's guide to Starbucks espresso drinks

www.beveragestandardsassociation.co.uk – The Beverages Standards Association

www.cafebar.co.uk/coffee_school/coffee_tips_and_advice.aspx – Cafe Bar – coffee tips and advice

www.cafebar.co.uk/coffee_school/coffee_tips_and_advice/tips_for_the_perfect_espresso.aspx – Cafe Bar, tips for the perfect espresso

www.caffesociety.co.uk/coffee-machine-guide – coffee machine guide

www.home-barista.com – Home Barista, espresso machine reviews

www.people1st.co.uk – People 1st, Sector Skills Council for hospitality, passenger transport, travel and tourism

Unit 6: Dealing with Payments

Unit reference number: L/600/1133

QCF level: 2

Credit value: 1

Guided learning hours: 9

Unit aim

The aim of this unit is to develop learners' knowledge of how to maintain and deal with payments.

Unit introduction

In this unit, learners will develop the underpinning knowledge required to handle payments with confidence and accuracy.

The ability to work with care and attention to detail is essential when operating a payment point and contributes to the financial success of any hospitality business.

Learners need to know how to set up and operate a payment point, including the materials required to maintain and deal with payments efficiently. Knowing how to deal with problems that may arise, including illegal and fraudulent transactions, is an important aspect of the process. This unit requires learners to know how to follow security procedures when handling cash and other payments, and why it is important to report errors and deal with any delays efficiently and in a professional manner. It is essential for anyone operating a payment point to know their legal responsibilities and learners must be given this information.

Learners will explore electronic payment systems and non-cash transactions in general use across the hospitality industry, how to process frequently used payment methods correctly and the problems associated with these methods.

Essential resources

For this unit, learners should have access to a suitable hospitality environment, ideally including access to electronic payment systems.

A selection of contemporary hospitality books, journals and DVDs and CD ROMs would also be useful learning materials.

It is assumed that learners will have access to workplace materials and procedures.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Know how to set up a payment point	1.1	Identify the materials needed to set up and maintain a payment point	<ul style="list-style-type: none"> □ <i>Payment point:</i> electronic; manual □ <i>Materials:</i> cash; cash equivalents (cheques, hospitality vouchers, discount vouchers); relevant stationery (pens, VAT receipts, bill, till rolls) credit card machines, cash registers
		1.2	State the importance of having procedures for collecting the contents of the payment point	<ul style="list-style-type: none"> □ <i>Contents:</i> float, coins for change (£2.00, £1.00, 50p, 20p, 10p, 5p, 2p, 1p), notes for change (£50, £20, £10, £5), payment receipts; organisation of till drawer □ <i>Procedures:</i> opening procedure (counting float, reporting discrepancies, recording cash, checking till rolls); closing procedure (counting float, checking balance against till readings, completing record sheets, reporting procedure for discrepancies, authorised collection by manager or supervisor); efficient service (sufficient change, till rolls); importance of procedures (customer satisfaction, efficient service, reducing errors and theft)
2	Know how to operate a payment point	2.1	Describe the correct procedures for handling payments	<ul style="list-style-type: none"> □ <i>Payments:</i> entering information (price, payment, tendered price); contingency plans (reverting to manual system, calling manager); cash (checking amount tendered, counting change back to customer) cheques (card numbers, signatures, dates, amounts in words and figures, payee details, credit limits); credit and debit cards (entering into card machine, following instructions, card processing protocols, Data Protection Act 1998)
		2.2	State the importance of reporting errors that may occur during payment	<ul style="list-style-type: none"> □ <i>Errors:</i> reporting errors (minimising losses, maintaining profitability, customer satisfaction)

Learning outcomes		Assessment criteria		Unit amplification
		2.3	Identify security procedures for handling cash and other types of payments	<ul style="list-style-type: none"> □ <i>Security:</i> ensuring payment point is not left unattended; restricted access to payment point (non-unauthorised persons, use of passwords, electronic identification keys); personal identification numbers for credit and debit cards; process for validating payments; procedure for declining payment (calling manager, following complaints procedure if necessary)
		2.4	State the legal requirements for operating a payment point when taking payments from customers	<ul style="list-style-type: none"> □ <i>Legal requirements:</i> data protection (customers' personal details, customer PIN); fraud (counterfeit coins, notes, suspect credit and debit cards, retention of credit and debit cards)
3	Know the problems that may occur at the payment point	3.1	Describe the types of problems that might happen when dealing with a payment	<ul style="list-style-type: none"> □ <i>Problems:</i> invalid payment methods; refused authorisation; suspected fraud; disputed bills; power failure; slow connections; insufficient cash; incorrect billing
		3.2	State the importance of telling the customer about any delays during the payment process	<ul style="list-style-type: none"> □ <i>Delays:</i> keeping customers informed (customer satisfaction, avoiding complaints)

Information for tutors

Delivery

When delivering this unit, tutors should be aware that learners may be familiar with the operation of a payment point but not necessarily with the range of payment methods now in common use across the industry, and the associated problems.

A range of interesting and engaging learning strategies should be used to ensure that learners are fully aware of the procedures they must follow when setting up and operating a payment point efficiently and securely. Delivery could include practical sessions to ensure learners know the materials they will need to set up a payment point, and role play and discussions to develop their knowledge of dealing with errors. The complexities of dealing with collections from payment points could be covered by role-play activities, to illustrate the consequences of ineffective working procedures.

Learners should be encouraged to think about their own experience of operating a payment point to help develop their knowledge of the associated legal responsibilities. Access to a range of online and library resources would enable learners to investigate current legislation.

Learners should be given a range of situations they might face when operating a payment point, giving them the opportunity to identify problems and difficulties and how these should be resolved. This could include why they need to protect themselves against misunderstandings, genuine or otherwise. Role play and simulations could also be effective ways of developing this understanding. It would also be helpful for learners to have the opportunity to process a range of payment methods, enabling them to see which problems relate to which methods. Visiting speakers from financial institutions could assist in raising learner awareness of a range of practical payment problems and make the subject more interesting, for example recognising counterfeit coins and notes and dealing with suspect credit cards.

Assessment

This unit can be assessed through a portfolio of evidence or through an onscreen multiple-choice test. Pearson will set and mark the test. The test uses the individual assessment criteria and the associated *Unit amplification*.

Tutors should ensure that learners cover all the *Unit amplification*.

Suggested resources

Textbooks

Cousins J and Lillicrap D – *Essential Food and Beverage Service (Levels 1 and 2)* (Hodder Education, 2010) ISBN 9781444112528

Cousins J, Lillicrap D and Weekes S – *Food and Beverage Service, 8th Edition* (Hodder Education, 2010) ISBN 9781444112504

Journal

Caterer and Hotelkeeper – Reed Business Information

Websites

www.barkeeper.co.uk/page.asp?menu=190&page=836 – barkeeping for hospitality businesses

www.hse.gov.uk/pubns/ – Health and Safety Executive – health and safety resource

13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandcolleges.co.uk

Key publications:

- Adjustments for candidates with disabilities and learning difficulties – Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications (Joint Council for Qualifications (JCQ))
- *Equality Policy (Pearson)*
- *Recognition of Prior Learning Policy and Process (Pearson)*
- *UK Information Manual (Pearson)*
- *UK Quality Vocational Assurance Handbook (Pearson)*.
- *All of these publications are available on our website.*

Publications on the quality assurance of BTEC qualifications are available on our website at qualifications.pearson.com

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Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

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14 Professional development and training

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- **Ask the Expert:** submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.

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Annexe A

Mapping with National Occupational Standards

The grid below maps the knowledge covered in the Pearson BTEC Level 3 Certificate in Principles of Hospitality Retail Outlet Management (QCF) against the underpinning knowledge of the National Occupational Standards in Hospitality. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

indicates partial coverage of knowledge in the NOS unit

A blank space indicates no coverage of the knowledge

Pearson BTEC Specialist units National Occupational Standards	Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6
	2GEN1/10	#				
HSL3		#				
HSL5		#				
HSL5			#			
HSL23			#			
HSL10				#		
HSL11				#		
HSL28				#		
2BS8/10					#	
2GEN9/10						#

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