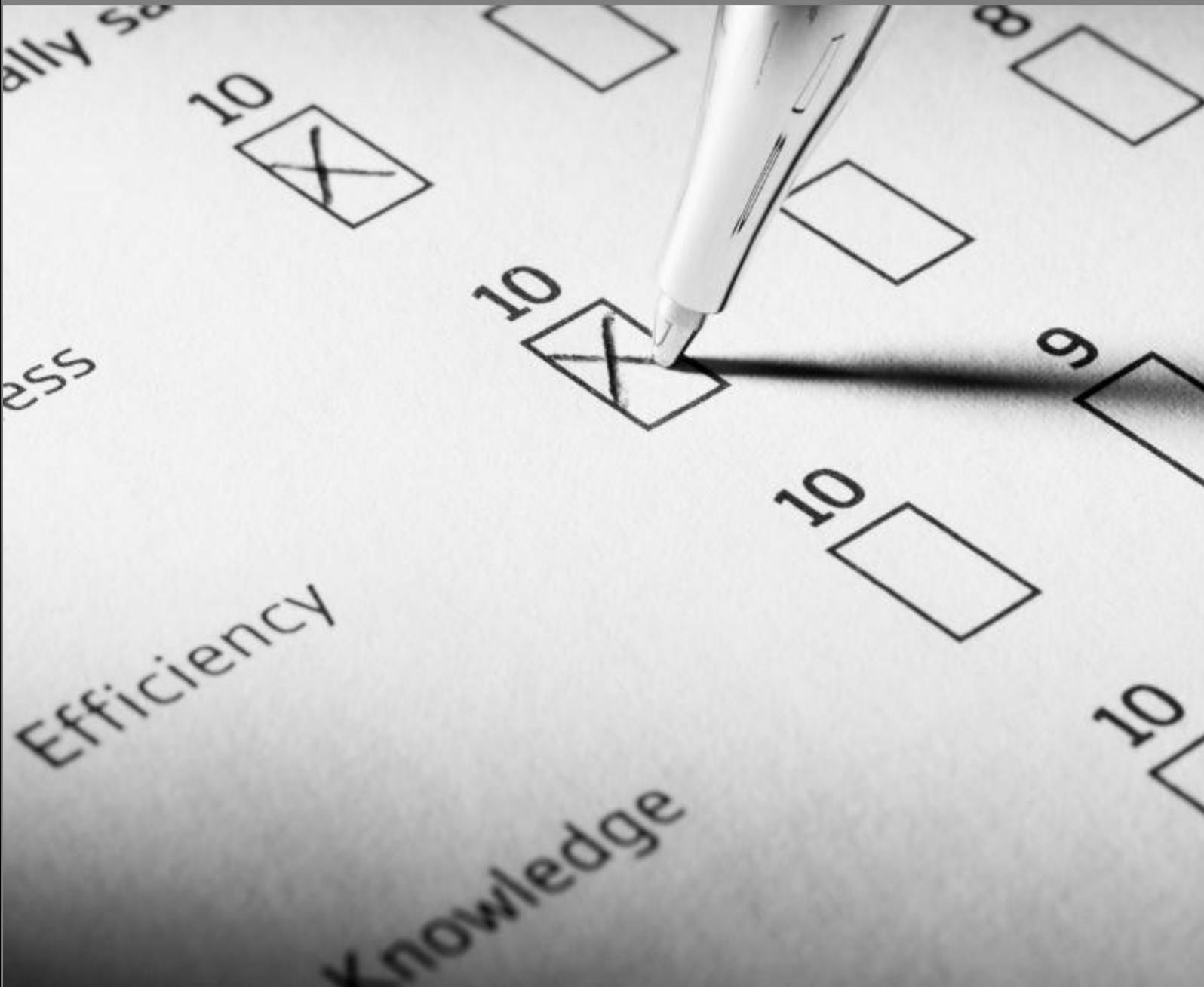




Monitor catering revenue and costs

D1.HFI.CL8.08

Assessor Manual



Monitor catering revenue and costs

D1.HFI.CL8.08

Assessor Manual



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for foods, tourism
& hospitality

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Competency Based Assessment (CBA) – An introduction for assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested assessment methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative assessment methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

- a) The nature of the unit
- b) The strengths of participants
- c) The number of participants in the class
- d) Time required to complete assessments
- e) Time dedicated to assessment
- f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes
- Log books
- Projects and Role plays

- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of assessment methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

- a) Undertake further training or instruction
- b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of practice for assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and checklist for assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

| | Tick (✓) | Remarks |
|--|----------|---------|
| Prior to the assessment I have: | | |
| Ensured the candidate is informed about the venue and schedule of assessment. | | |
| Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP). | | |
| Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process. | | |
| Identified and accommodated any special needs of the candidate. | | |
| Checked the set-up and resources for the assessment. | | |
| During the assessment I have: | | |
| Introduced myself and confirmed identities of candidates. | | |
| Put candidates at ease by being friendly and helpful. | | |
| Explained to candidates the purpose, context and benefits of the assessment. | | |
| Ensured candidates understood the assessment process and all attendant procedures. | | |
| Provided candidates with an overview of performance criteria to be assessed. | | |
| Explained the results reporting procedure. | | |
| Encouraged candidates to seek clarifications if in doubt. | | |
| Asked candidates for feedback on the assessment. | | |
| Explained legal, safety and ethical issues, if applicable. | | |

| | Tick (✓) | Remarks |
|--|----------|---------|
| After the assessment I have: | | |
| Ensured candidate is given constructive feedback. | | |
| Completed and signed the assessment record. | | |
| Thanked candidate for participating in the assessment. | | |

Instructions for recording competency

Specifications for recording competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for different assessment methods

Specifications for work project assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected

- Prepare sufficient resources for the completion of work activities including:
 - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
 - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place
- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

“At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

These work projects are part of the formal assessment for the unit of competency titled X:

- You are required to complete these activities:
 - a) *Using the 'X' method of assessment*
 - b) *At 'X' location*
 - c) *You will have 'X time period' for this assessment*
- You are required to compile information in a format that you feel is appropriate to the assessment
- Do you have any questions about this assessment?”
- Commence Work Project assessment:
 - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
 - Participants complete work projects in the most appropriate format
 - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
 - Enter Student name

- Enter Assessor name
- Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):
“These oral questions are part of the formal assessment for the unit of competency titled X.
There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.
We have 60 minutes for this assessment.
 - I will give you feedback at the end of the assessment
 - Do you have any questions about this assessment?”
- Commence Oral Questioning assessment:
 - Complete Assessment Record for the Oral Questioning by:
 - a) Ticking PC or NYC, as appropriate
 - b) Entering 'Remarks' as required
 - c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

“These written questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability.

You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

We have X time for this assessment:

- The due date for completion of this assessment is X
- On this date you must forward the completed questions to the assessor by X time on the date of X
- Do you have any questions about this assessment?”
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date
- Assessor must assess the participant’s written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a ‘competent’ standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the ‘Yes’ or ‘No’ box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the ‘Pass Competent’ or ‘Not Yet Competent’ decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
 - Pass Competent = Yes
 - Not Yet Competent = No
 - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency Standard

| | | |
|---|---|--------------------------|
| UNIT TITLE: MONITOR CATERING REVENUE AND COSTS | | NOMINAL HOURS: 35 |
| UNIT NUMBER: D1.HFI.CL8.08 | | |
| UNIT DESCRIPTOR: This unit deals with skills and knowledge required to enable food supervisors and managers to monitor catering revenue and costs by using a system that tracks the performance of a food operation within a food department, outlet or enterprise | | |
| ELEMENTS AND PERFORMANCE CRITERIA | UNIT VARIABLE AND ASSESSMENT GUIDE | |
| <p>Element 1: Use financial record keeping technology</p> <p>1.1 <i>Identify and use, where appropriate, computer systems</i> to facilitate implementation of identified purchasing, ordering and financial controls</p> <p>1.2 Identify and obtain, where appropriate, effective and user-friendly <i>software</i> to underpin the initiation and/or use of identified computer systems</p> <p>1.3 <i>Integrate identified catering revenue and cost objectives</i> and requirements into existing financial control systems, where applicable</p> <p>1.4 Enter catering financial data into established control systems</p> <p>1.5 <i>Manipulate catering financial data</i> into established control systems</p> | <p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment</p> <p>This unit applies to food supervisors and managers monitoring catering revenue and costs by using a food operation performance tracking system within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Food and Beverage Service 2. Food Production <p><i>Identify and use, where appropriate, computer systems</i> will only relate to enterprises and/or departments where such facilities do not already exist</p> <p><i>Software</i> may include:</p> <ul style="list-style-type: none"> • Specialist accounting software and packages • Relevant database programs • System-specific software recommended by system manufacturers. | |

Element 2: Create financial control system

- 2.1** Develop, or confirm an existing, effective financial control system to record and track the performance of the catering department
- 2.2** Input *financial data* into the catering department computerised control system

Element 3: Create production control system

- 3.1** Develop, or confirm an existing, effective production control system to record and track the performance of the catering department
- 3.2** Input *production data* into the catering department computerised control system

Element 4: Respond to the results produced by the established control systems

- 4.1** *Take action to address expenditure figures that are deemed unacceptable*
- 4.2** *Take action to address revenue figures that are deemed unacceptable*
- 4.3** *Negotiate with management to obtain revised budget figures*

Integrate identified catering revenue and cost objectives will only relate to enterprises and/or departments where suitable computer systems and software already exist.

Manipulate catering financial data refers to:

- Updating budgets and producing regular updated budgets to reflect current actual versus projected figures and performance
- Generating performance reports, including income statements, labour reports, cost of goods sold, department performance figures and percentages and department profit and loss.

Financial data must include:

- Revenue generated by the department, including cash and credit sales which must address internal sales and external sales
- Cost of goods sold incurred by the department
- Repairs and maintenance, as appropriate, according to internal accounting and allocation procedures
- Replacement of items, as appropriate, according to internal accounting and allocation procedures
- Tracking and recording stock returned to suppliers for credit
- Timely inputting of data.

Production data must include:

- Development of food production controls, including standard recipes, production sheets, quantity and quality criteria and production schedules
- Development of work flows to optimise production efficiency
- Minimising labour costs while maintaining production levels, required food standards and quality
- Tracking sales to enable amendments to production quantities, changes to menu items and reflection of emerging customer demand and preferences
- Monitoring of stock losses, including losses in storage, damaged products that become unfit for sale and product wastage.

Taking action to address expenditure figures may relate to:

- Reducing serve sizes
- Changing suppliers or re-negotiating prices
- Revising or limiting menus
- Using substitutes, including alternative products, pre-prepared and convenience foods
- Reducing labour
- Verifying that only catering department costs are being allocated to the catering department budgets
- Reducing wastage, which may include improving storage and security, enhancing staff training, revising ordering protocols.

Taking action to address revenue figures may relate to:

- Verifying that all catering department sales are being allocated to the catering department budgets
- Increasing selling prices
- Ensuring all legitimate revenue is being secured, including from internal and external sources
- Reducing and/or eliminating discounts, special deals and complimentary items that are being offered
- Enhancing or altering promotional activities.

Negotiating with management may involve:

- Presenting and explaining evidence of trade, operations and performance
- Identifying and explaining circumstances that have caused variances
- Negotiating for revised revenue and expenditure performance targets.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- The enterprise's policies and procedures in regard to ordering, storing, securing and using stock
- Awareness of the internal enterprise documents used in the monitoring of catering and revenue
- Awareness of the internal and external business environment in which the host enterprise is operating
- The enterprise's policies and procedures in regard to document completion and management, data entry, financial management, stock management and control
- Overview of the relevant legislation in relation to financial reporting, record keeping and taxation for the host country
- Understanding of the basic principles of accounting, record keeping and the production and analysis of financial management reports
- Demonstrated ability to respond effectively to sub-optimal financial outcomes.

Linkages To Other Units

- Access and retrieve computer-based data
- Receive and store kitchen supplies and food stock
- Establish and maintain quality control in food production
- Establish and maintain a business relationship
- Develop and implement a business plan
- Design, prepare and present various types of reports
- Maintain a paper-based filing and retrieval system
- Monitor and maintain a business computer system

- Use common business tools and technology
- Maintain financial standards and records
- Comply with workplace hygiene procedures
- Manage financial performance within a budget
- Prepare and monitor budgets
- Roster staff
- All food production/cooking units, to provide information to assist in the selection of appropriate ingredients/materials and to facilitate in the development of staff rosters and production-related guidelines.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of accounting principles, record keeping requirements and the generation of financial reports
- Demonstrated ability to use an effective financial performance system that reflects the operation and status of the catering department
- Demonstrated ability to investigate the internal and external environment within which a catering department functions
- Demonstrated ability to take effective remedial action to redress financial outcomes that are below expectations/targets.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of a newly established or existing system to accurately and effectively monitor the financial performance of the catering department so that immediate remedial action can be taken, where necessary, to bring performance back in-line with budgeted/target indicators.

| | <p>Resource Implications</p> <p>Training and assessment must include the use of an actual computerised system and software, together with real or simulated targets, budgets, and trading and operational figures; and access to workplace standards, procedures, policies, guidelines, tools and equipment.</p> <p>Assessment Methods</p> <p>The following methods may be used to assess competency for this unit:</p> <ul style="list-style-type: none"> • Observation of practical candidate performance • Practical exercises in entering and manipulating revenue and expenditure data • Verbal/written suggestions for addressing nominated industry examples of shortfalls in revenue and costs excesses • Oral and written questions • Third party reports completed by a supervisor • Project and assignment work. <p>Key Competencies in this Unit</p> <p><i>Level 1 = competence to undertake tasks effectively</i></p> <p><i>Level 2 = competence to manage tasks</i></p> <p><i>Level 3 = competence to use concepts for evaluating</i></p> | | | | | | |
|--|--|---|-------|----------|--|---|---|
| | <table border="1"> <thead> <tr> <th>Key Competencies</th> <th>Level</th> <th>Examples</th> </tr> </thead> <tbody> <tr> <td>Collecting, organising and analysing information</td> <td>2</td> <td>Investigate establishment financial requirements and the business environment; identify the computer system, software and operational protocols to be used; develop and interpret operational reports and performance figures</td> </tr> </tbody> </table> | Key Competencies | Level | Examples | Collecting, organising and analysing information | 2 | Investigate establishment financial requirements and the business environment; identify the computer system, software and operational protocols to be used; develop and interpret operational reports and performance figures |
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| Collecting, organising and analysing information | 2 | Investigate establishment financial requirements and the business environment; identify the computer system, software and operational protocols to be used; develop and interpret operational reports and performance figures | | | | | |

| | | | |
|--|---|---|--|
| | Communicating ideas and information | 2 | Discuss and clarify financial performance issues with management; suggest remedial action to address identified variances in performance |
| | Planning and organising activities | 2 | Develop work flows, production schedules and operational procedures |
| | Working with others and in teams | 2 | Cooperate with staff, management and suppliers to achieve optimal performance results |
| | Using mathematical ideas and techniques | 2 | Manipulate financial data; calculate order quantities |
| | Solving problems | 2 | Take action to address identified variances in performance |
| | Using technology | 2 | Input data into computer systems and use same to generate nominated reports |

Oral Questions

| | |
|---------------------------|---|
| Student name | |
| Assessor name | |
| Location/venue | |
| Unit of competency | Monitor catering revenue and costs D1.HFI.CL8.08 |
| Instructions | <ol style="list-style-type: none"> 1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question. |

| Questions | Response | |
|--|--------------------------|--------------------------|
| | PC | NYC |
| 1. Explain how you use your workplace computer systems to implement required purchasing and financial controls for catering. | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. What software do you use to manage the catering financial controls and what are its benefits and disadvantages? | <input type="checkbox"/> | <input type="checkbox"/> |

| Questions | Response | |
|--|--------------------------|--------------------------|
| | PC | NYC |
| 3. Give an example of the need to integrate identified catering revenue and cost objectives and requirements into the existing financial control system used in the business where you work. | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Explain how you enter catering financial data into your workplace financial control systems. | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Give two examples of manipulating catering financial data within your workplace financial control system. | <input type="checkbox"/> | <input type="checkbox"/> |

| Questions | Response | |
|---|--------------------------|--------------------------|
| | PC | NYC |
| 6. How do you confirm your workplace financial control system is operating correctly to effectively record and track the performance of the catering department? | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Identify three types of financial data which may need to be inputted into your workplace financial control system to update/maintain system records. | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. How do you confirm your workplace production control system is operating correctly to effectively record and track the performance of the catering department? | <input type="checkbox"/> | <input type="checkbox"/> |

| Questions | Response | |
|---|--------------------------|--------------------------|
| | PC | NYC |
| 9. Give three examples of how production data can be used to help control production of the catering department. | <input type="checkbox"/> | <input type="checkbox"/> |
| 10. Give three examples of possible action you could take to address unacceptable expenditure figures revealed by the control systems in the workplace. | <input type="checkbox"/> | <input type="checkbox"/> |
| 11. Identify three examples of responses you might implement to address unacceptable revenue figures identified by the workplace control systems. | <input type="checkbox"/> | <input type="checkbox"/> |

| Questions | Response | |
|---|--------------------------|--------------------------|
| | PC | NYC |
| 12. Describe three activities which may be involved in the process of negotiating with management to obtain revised budget figures. | <input type="checkbox"/> | <input type="checkbox"/> |

Written Questions

Monitor catering revenue and costs – D1.HFI.CL8.08

Student Name: _____

Answer all the following questions and submit to your Trainer.

- 1. Define revenue, expenses and profit.

- 2. How does a stand-alone catering operation and one that is part of an establishment differ with regard to the expenses each must consider?

- 3. List 4 internal control measures.

- 4. List four areas in catering operations that are of particular concern for internal controls.

5. List three factors that should be considered when designing a computerised control system.

6. Choose two computer hardware options describing the benefits of each to catering operations.

7. Describe three computer software options available for catering operations.

8. Choose three catering revenue and cost objectives or requirements and describe the objective or requirement and the manner in which it can be implemented into the financial control system.

9. What is catering financial data?

10. What are the two main categories of data that are entered into a financial system? Provide three examples of each in your answer.

11. Describe two types of budgets that are updated with catering financial data when information is entered into the financial control system.

12. What are performance reports? How frequently are they generated and what sort of information do they contain?

13. What are Uniform Systems of Accounts and why were they created for restaurants?

14. Describe the three components of a profit and loss statement. How are expenses most effectively classified for catering operations?

15. What information does the food cost percentage and the food inventory turnover rate provide regarding the performance of the catering operation?

16. What is the calculation for the labour cost percentage and how do managers use this to control labour costs?

17. Describe the accounting cycle for catering operations. List two source documents and the five categories financial data is classified into by the computerised financial system.

18. What are the steps in the production process?

19. List and describe three examples of controls regarding the ordering, receipt and storage of food supplies.

20. How do you determine the amount of a given menu item to prepare and where may this information be recorded?

21. Give three procedures you could implement to ensure the security of products when they are issued from the storeroom.

22. Briefly describe how a stocktake is conducted.

23. Explain why portion control is important and two methods used to control portion sizes.

24. List four tips for minimising theft.

25. What information is entered into the production control system to monitor and control food production?

26. Describe the manner in which variances can be broken down to determine the reason why the variance has occurred.

27. Describe two ways you might address an unfavourable food cost percentage and a high inventory turnover rate.

28. Describe three control procedures that should be reviewed if a revenue variance is unfavourable.

29. Describe two strategies to correct an unfavourable revenue variance.

30. Briefly outline the role of the budget in catering operations.

31. List four negotiation techniques you may use to convince management to revise the budget.

Answers to Written Questions

Monitor catering revenue and costs – D1.HFI.CL8.08

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. Define revenue, expenses and profit

- Total amount of earnings received by a business for providing goods and services for a certain period
- Costs incurred in the normal course of operations to support the production of revenue
- Profit is calculated by deducting from revenue or sales, all the expenses a catering operation incurs.

2. How does a stand-alone catering operation and one that is part of an establishment differ with regard to the expenses each must consider?

In a stand-alone operation, it is not just purchases that are expenses but all monies spent to convert purchases to the final product. When a catering operation is part of an establishment such as an accommodation venue, profit goals need to consider covering the costs of areas that do not generate revenue or sales such as maintenance.

3. List three internal control measures

Any three of the following:

- Safeguard its assets
- Promote efficient operations
- Maintain accurate and reliable accounting records
- Encourage and promote compliance with business policies and government regulations.

4. List four areas in catering operations that are of particular concern for internal controls

Any four of the following:

- Menu design, recipes and costs
- Staffing needs, rostering and costs
- Ordering, receiving and storing food and beverage stock or inventory
- Preparation of food and beverages for resale
- Service and quality control
- Stocktakes
- Audits
- Budget and financial controls.

5. List three factors that should be considered when designing a computerised control system

Any three of the following:

- Personnel and their job descriptions that required to operate the new or changed system
- Source documents that record activities or events
- Records and procedures to process data
- Reports to be generated.

6. Choose two computer hardware and three computer software options describing the benefits of each to catering operations

Any two of the following hardware options:

- Internet-Based POS System
 - a) Electronically connected for sharing data
 - b) Reduce hardware costs
 - c) Multiple user access levels
 - d) Enhance data security and integrity
 - e) Always accessible
- Handwriting Recognition System

Servers can write down orders that are then sent directly to the kitchen without ever having to leave the guest's table.
- Voice Over Internet Protocol (VoIP)

Reduces international phone charges
- Staff Sharing Technology

This two-way interactive video device allows staff to "see" and talk directly with employees and guests at other locations.
- Paperless Paycheque Systems

This system allows employees, to have instant access to their cash on payday, without paying unnecessary check cashing fees that are charged in some countries or locations.
- Motion Detection/Intelligent Systems Software

This is a combination of hardware and software that detects the number of people entering the establishment and can use historical sales data for that time of day to predict the number and type of menu items these guests are likely to order.

7. Describe three computer software options available for catering operations

Any three of the following software options:

- Financial control software
- Revenue software
- Recipe software
- Menu programs
- Purchasing software
- Receiving software
- Inventory programs
- Beverage control software
- Labour control programs
- Kitchen production programs
- Word processing, spreadsheet and database packages.

8. Choose three catering revenue and cost objectives or requirements and describe the objective or requirement and the manner in which it can be implemented into the financial control system

Any three of the following:

- Forecast revenue:
 - POS systems
- Revenue security:
 - POS systems
 - Separation of duties
 - Reconciliations
- Menu forecasting:
 - POS systems
- Managing the cost of food:
 - Standardised recipes
 - Kitchen production controls
 - Separation of duties
- Managing the cost of beverages:
 - POS systems
 - Separation of duties
 - Reconciliations
 - Standardised recipes
 - Stocktakes

- Inventory management and control:
 - POS systems
 - Separation of duties
 - Reconciliations
 - Standardised recipes
 - Stocktakes
- Managing labour costs:
 - Clear policies regarding the screening and selection of new employees
 - Training of new employees to be cost efficient and appropriate to the position
 - Separation of responsibilities from hiring new staff, approval of pay rates and processing of payroll
 - Mechanical or electronic capture of hours worked if appropriate otherwise forms should be designed that must be completed for hours to be recognised and processed
 - Pre-numbered documents such as identification number for each employee, processing documents are used
 - Spot checks are conducted on payroll sheets to verify accuracy of calculations
 - A separate bank account is maintained for payroll to provide more accurate means of verifying and reconciling payments to employees.

9. What is catering financial data?

- Catering financial data includes:
 - All catering cost information
 - Revenues generated from catering activities and events
 - Profits or operating income that summarise performance
 - Documentation that supports the activities and events in the catering operation.

10. What are the two main categories of data that are entered into a financial system? Provide three examples of each in your answer

Historical data – any three of the following:

- Sales histories in monetary amounts
- Menu item summaries that include both the number and value of items sold
- Pricing histories
- Sales for which payment has not yet been received
- Previous popularity indices for each menu item
- Standardised recipes that are no longer used but support other historical data
- Cost of Goods Sold calculations – for food and beverage costs
- Food and beverage cost percentages
- Agreements with previous suppliers for price, quantity and delivery terms
- Inventory summaries that include details of ordering patterns, usage statistics and show the flow of inventory on hand
- Labour productivity and cost information including labour cost percentages, scheduling and rostering information
- Details of other costs
- Performance reports including profit and loss statements, revenue reports, payroll reports and cost of goods sold analysis.

Current data – any three of the following:

- Current standardised recipes.
- Current popularity indices for menu items
- Agreements with current suppliers for price, quantity and delivery terms
- Reporting requirements including classification of costs, report formats for internal use and to meet external obligations and reporting periods
- All budgets prepared for the catering operation
- Staff needs and rostering documents
- Repairs and maintenance schedules for kitchen operations
- Amount and value of current inventory on hand
- Employee records detailing pay rates, conditions and other information such as when and if meal allowances are given
- All standard forms and documents that were agreed in the systems design and implementation phases of development.

11. Describe two types of budgets that are updated with catering financial data when information is entered into the financial control system

Any two of the following:

- Master budget – This is the budget for the whole business and includes cashflow requirements, profit and loss and balance sheet budgets. It includes all operations and departments
- Department budget – Each department or functional area will have its own budget. Some budgets will show revenues and expenses such as catering and others only expenses such as the maintenance department. Monthly and annual targets, average spend and number of covers may be information that is included, both in percentages and monetary amounts
- Payroll budgets – In a larger establishment, this budget details payroll costs for each department and provides an overview of staff performance and rates
- Purchasing budgets – sometimes this is called an expense budget and is reported for each significant expense. For a kitchen, this would include food and consumables such as plastic wrap to cover food.

12. What are performance reports? How frequently are they generated and what sort of financial data do they contain?

Performance reports are generated from the financial control system that summarise the activities or events within each stage of the cycle and for the operation as a whole. Revenue cycles also determine the frequency for which performance reports are prepared. These can be daily cycles such as different meal sittings for catering operations or weekly cycles where types of guests differ – corporate guests on work days and leisure guests during non work times.

Financial data should include the following:

- Revenue
- Expenses – in total and by individual expense category such as labour, food costs
- Profit
- Assets
- Liabilities
- Cash
- Inventory
- Wastage.

13. What are Uniform Systems of Accounts and why were they created for restaurants?

To ensure that financial information is presented in a way that is both useful and consistent, uniform systems of accounts have been established for many areas of the hospitality industry. These guidelines are not mandatory but provide basic formats and principles that catering operations may follow.

14. Describe the three components of a profit and loss statement. How are expenses most effectively classified for catering operations?

- The gross profit section consists of food and beverage sales and costs that can and should be controlled by the catering manager on a daily basis
- The operating expenses section is also under the control of the manager but more so on a weekly or monthly basis (with the exception of wages which can be controlled daily). Consider the Repairs and Maintenance category. Although repairs to equipment are needed when equipment breaks down, maintenance is typically scheduled on a monthly basis
- Non-operating expenses section is the least controllable by the catering manager. For example, interest and taxes are due regardless of the ability of the manager to control operations
- When evaluating the performance of catering operations, managers will focus their analysis and decision-making on controllable costs. Controllable costs are those costs that catering managers can manage and control. Food, beverage, labour and advertising costs are common examples.

15. What information does the food cost percentage and the food inventory turnover rate provide regarding the performance of the catering operation?

The food cost percentage explains the amount of revenue that has been spent on purchasing food.

The food inventory turnover rate refers to the number of times inventory has been purchased and replaced in a given period.

16. What is the labour cost percentage and how do managers use this to control labour costs?

The payroll cost percentage is:

$\text{Total Salaries and Wages expenses} \div \text{Total Sales} = \text{Payroll cost \%}$

Generally, when labour expenses are controlled appropriately, increases in sales will result in a corresponding increase in labour costs to serve the customers or guests. The payroll or labour cost percent enables managers of catering operations to assess this.

17. Describe the accounting cycle for catering operations. List two source documents and the five categories financial data is classified into by the computerised financial system

- Analyse source documents
- Record transactions in journals and ledgers
- Prepare an unadjusted trial balance
- Process adjusting entries
- Prepare a final trial balance
- Prepare financial reports.

Two source documents from the following:

- Purchase order – goods or services are ordered from a supplier
- Invoice – request for payment from a supplier for goods or services provided
- Cash register tapes – record cash received from cash sales
- Timesheets recording hours worked
- Goods received documents
- Forms to issue inventory from stores.

Five categories for the classification of financial data:

- Assets
- Liabilities
- Owners equity
- Revenue
- Expenses.

18. What are the steps in the production process?

- Maintain sales histories
- Forecast future sales levels
- Purchase and store required food and beverage supplies
- Plan daily production schedules
- Issue products to kitchen production areas
- Manage the food and beverage process.

19. List and describe three examples of controls regarding the ordering, receipt and storage of food supplies

Any three of the following:

- Clear purchasing descriptions and quotes from suppliers to determine actual costs
- Timely delivery of goods to minimise waste and spoilage
- Checking goods received for consistency, quality and correct quantities
- Forwarding documentation such as invoices for payment in a timely manner
- Ordering should be based on information the computerised system that will detail amounts to ensure the best value and to maximise shelf life of the product
- Supplies should be stored with appropriate consideration to temperature, ventilation and packaging.

20. How do you determine the amount of a given menu item to prepare and where may this information be recorded?

The process for determining how much of a given menu item to prepare on a given day would look like this:

- $\text{Prior day carry over} + \text{Today's production} = \text{Today's sales forecast (+ margin of error)}$
- This information is recorded on daily production schedules.

21. Give three procedures you could implement to ensure the security of products when they are issued from the storeroom

- Food, beverages, and supplies should be requisitioned only as needed based on approved production schedules
- Required items should be issued only with appropriate approval
- If a written record of issues is to be kept, each person removing food, beverages, or supplies from the storage area must sign, acknowledging receipt of the products
- Products that do not ultimately get used should be returned to the storage area and their return recorded
- Dedicated storeroom personnel are employed.

22. Briefly describe how a stocktake is conducted

At the end of a given period, the computerised control system generates a list of all inventory items relevant to the catering operation. Usually two employees are assigned to count the items in the storeroom and enter the amount counted on the list. Some organisations use hand held scanners to scan bar codes to assist this task.

When the count is complete, the amounts are entered into the computerised system and compared to the amounts in the system. Discrepancies must be investigated and resolved.

23. Explain why portion control is important and two methods used to control portion sizes

It is important to control the size of menu portions provided to customers because:

Over portioning increases catering costs and may cause the operation to mismatch its production schedule with anticipated demand.

Customers or guests require consistency so a large portion one day and a smaller portion the next may cause them to question that they have received fair value for money.

Any two of the following:

- Scales
- Scoops
- Ladles or spoons
- Consistent dish sizes
- Standard size of products such as one egg or one banana.

24. List four tips for minimising theft

Any four of the following:

- Keep all storage areas locked and secure
- Issue food only with proper authorisation and management approval
- Monitor the use of all carryovers
- Do not allow food to be prepared unless a guest check or written request precedes the preparation
- Maintain an active inventory system and conduct stocktakes of all products
- Ensure that all food received is signed for by the appropriate receiving clerk
- Do not pay suppliers for food products without an appropriate and signed invoice
- Do not allow employees to remove food from the premises without management's specific approval.

25. What information is entered into the production control system to monitor and control food production?

- Standardised
- All items of inventory with specific details such as:
 - Unit measurements
 - Monetary value per unit
 - Total monetary value
 - Weights in local measurements including purchase weight, weight when peeled or trimmed and weight after cooking
 - Ordering quantities
- Purchasing and issuing of supplies. As supplies are requested, stock movements are entered into the computerised system. This indicates to purchasing when new orders need to be placed and updates the amount of inventory held to be checked during stocktakes
- Yield information
- Standard portion sizes by weight or other measurement so that staff are aware of the portions to prepare and serve
- Waste management information.

26. Describe the manner in which variances can be broken down to determine the reason why the variance has occurred

Sales revenue variances are broken down into price (sales prices) and volume (quantity sold) differences and expense variances into cost (hourly rate) and quantity (hours worked) components.

27. Describe two ways you might address an unfavourable food cost percentage and a high inventory turnover rate

Any two of the following for the Food cost percentage:

- Decrease portion size relative to price
- Vary recipe composition
- Adjust product quality by using substitutes or pre-prepared foods
- Achieve a more favourable sales mix
- Ensure that all product purchased is sold
- Increase price relative to portion size
- Changing suppliers or re-negotiating prices
- Reducing labour
- Improving staff training
- Revising ordering processes
- Verifying that only catering department costs are being allocated to the catering department budgets.

Any two of the following for inventory turnover rate:

- Temperature controls and correct work practices are minimising spoilage
- Waste is minimised by preparing products according to standard procedures. Average waste percentages can provide a good indication of the amount of waste that can be expected from food products
- Only requested goods are issued to the kitchen
- Security procedures are being followed with regard to the movement of food supplies
- Revise workplace policies and procedures to reflect the practices that employees should follow
- Implement additional security procedures such as checking bags when employees finish their shift if theft is suspected
- Offering kitchen staff monetary or other rewards when waste percentages are achieved
- Offering additional training on food handling techniques.

28. Describe three control procedures that should be reviewed if a revenue variance is unfavourable

Any three of the following:

- Verifying that permanent records of all product issues from the kitchen are made
- All product issues are reconciled or matched to guest or customer charges such as a bill or account
- Customer or guest bills are matched to sales receipts
- Both the cashier and a supervisor or manager must always verify sales receipts
- When cash is collected from POS terminals at the end of a day or shift and verified as above, it is the responsibility of managers or senior personnel in the catering operation to ensure that all bank deposits match actual sales
- Recording of revenue from sales for catering operations are correctly allocated to the catering department.

29. Describe two strategies to correct an unfavourable revenue variance

- Changing menu items if a particular menu item was not as popular as was thought. A technique called goal value analysis is commonly used in catering operations to assist such decisions
- Adjusting portion sizes – goal value analysis is also useful here
- Increasing selling prices
- Discounting
- Special deals
- Complimentary items
- Promotional offers
- Set menu prices and times.

30. Briefly outline the role of the budget in catering operations

The role of the catering budget can be summarised as follows:

- Forecasting – the budget sets realistic targets for the future providing goals and direction for catering operations
- Motivation – catering staff can be encouraged to work towards achieving the goals set by the budget, especially when these goals are explained and understood
- Co-ordination – this is particularly relevant when the catering department is part of a larger establishment. All departments need to work towards the same goals and the budget defines these goals
- Evaluate performance – comparing actual revenues and costs to budgeted revenues and costs enables an analysis of the catering operation and provides a basis for addressing any issues.

31. List four negotiation techniques you may use to convince management to revise the budget

Any four of the following:

- Decide what is negotiable - before you start to negotiate, decide what you are (and aren't) prepared to compromise. Key factors might include revenue targets or particular expense categories
- Plan your strategy - set clear goals and decide the overall approach that you will adopt
- Choose the right time and place for negotiation
- Outline your requirements, Open negotiations by outlining your requirements or terms and conditions and try to get others to reveal their starting point for discussions
- Ask questions and listen closely to answers. Asking questions will help you understand what your opposite number wants to achieve. You may be able to get them to reveal how flexible they are on certain issues
- Do not reveal your negotiating position and avoid making unnecessary concessions
- Be aware of negotiating tactics - Do not be forced into making rushed decisions. Each time a point is agreed, clarify that you've understood it correctly and write it down.

Observation Checklist

| | |
|-----------------------------|---|
| Student name | |
| Assessor name | |
| Location/venue | |
| Unit of competency | Monitor catering revenue and costs D1.HFI.CL8.08 |
| Dates of observation | |
| Instructions | <ol style="list-style-type: none"> 1. Over a period of time observe the student completing each of the following tasks: <ol style="list-style-type: none"> a) Use financial record keeping technology b) Create financial control system c) Create production control system d) Respond to the results produced by the established control systems 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required. |

| Did the candidate | Yes | No |
|---|--------------------------|--------------------------|
| Element 1: Use financial record keeping technology | | |
| Identify and use, where appropriate, computer systems to facilitate implementation of identified purchasing, ordering and financial controls | <input type="checkbox"/> | <input type="checkbox"/> |
| Identify and obtain, where appropriate, effective and user-friendly software to underpin the initiation and/or use of identified computer systems | <input type="checkbox"/> | <input type="checkbox"/> |
| Integrate identified catering revenue and cost objectives and requirements into existing financial control systems, where applicable | <input type="checkbox"/> | <input type="checkbox"/> |
| Enter catering financial data into established control systems | <input type="checkbox"/> | <input type="checkbox"/> |
| Manipulate catering financial data into established control systems | <input type="checkbox"/> | <input type="checkbox"/> |

| Did the candidate | Yes | No |
|---|--------------------------|--------------------------|
| Element 2: Create financial control system | | |
| Develop, or confirm an existing, effective financial control system to record and track the performance of the catering department | <input type="checkbox"/> | <input type="checkbox"/> |
| Input financial data into the catering department computerised control system | <input type="checkbox"/> | <input type="checkbox"/> |
| Element 3: Create production control system | | |
| Develop, or confirm an existing, effective production control system to record and track the performance of the catering department | <input type="checkbox"/> | <input type="checkbox"/> |
| Input production data into the catering department computerised control system | <input type="checkbox"/> | <input type="checkbox"/> |
| Element 4: Respond to the results produced by the established control systems | | |
| Take action to address expenditure figures that are deemed unacceptable | <input type="checkbox"/> | <input type="checkbox"/> |
| Take action to address revenue figures that are deemed unacceptable | <input type="checkbox"/> | <input type="checkbox"/> |
| Negotiate with management to obtain revised budget figures | <input type="checkbox"/> | <input type="checkbox"/> |
| Did the student's overall performance meet the standard? | <input type="checkbox"/> | <input type="checkbox"/> |

Feedback to student and trainer/assessor

Strengths:

Improvements needed:

General comments:

| | | | |
|----------------------------|--|-------------|--|
| Candidate signature | | Date | |
| Assessor signature | | Date | |

Third Party Statement

| | | | |
|---|---|--------------------------|--------------------------|
| Student name: | | | |
| Name of third party: | | Contact no | |
| Relationship to student: | <input type="checkbox"/> Employer <input type="checkbox"/> Supervisor <input type="checkbox"/> Colleague <input type="checkbox"/> Other <i>Please specify: _____</i> <i>Please do not complete the form if you are a relative, close friend or have a conflict of interest]</i> | | |
| Unit of competency: | Monitor catering revenue and costs D1.HFI.CL8.08 | | |
| <p>The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.</p> <p>Please answer these questions as a record of their performance while working with you. Thank you for your time.</p> | | | |
| Do you believe the trainee has demonstrated the following skills? <i>(tick the correct response]</i> | Yes | No | Not sure |
| Identifies, obtains and/or uses computer systems to implement purchasing, ordering and financial controls | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Integrates catering revenue and cost objectives and requirements into existing financial controls where/if required | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Enters catering financial data into the system and manipulates same as required | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Develops or confirms a financial control system suitable for the business enabling tracking of financial performance of the catering department | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Inputs financial data into the financial control system | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Develops or confirms a production control system suitable for the business enabling tracking of financial performance of the catering department | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Inputs production data into the production control system | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Takes action to address unacceptable expenditure and revenues figures | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Negotiates with management to obtain revised budget figures | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Comments/feedback from Third Party to Trainer/Assessor:

| | |
|--|--|
| | |
|--|--|

Third party signature:

Date:

Send to:

Competency Recording Sheet

| | | |
|--|---|---------------|
| Name of Student | | |
| Name of Assessor/s | | |
| Unit of Competency | Monitor catering revenue and costs | D1.HFI.CL8.08 |
| Date assessment commenced | | |
| Date assessment finalised | | |
| Assessment decision | Pass Competent / Not Yet Competent (Circle one) | |
| Follow up action required (Insert additional work and assessment required to achieve competency) | | |
| Comments/observations by assessor/s | | |

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

| Element & Performance Criteria | Observation of skills | 3rd Party Statement | Oral Questions | Written Questions | Work Projects | Other |
|---|-----------------------|---------------------|----------------|-------------------|---------------|-------|
| Element 1: Use financial record keeping technology | | | | | | |
| Identify and use, where appropriate, computer systems to facilitate implementation of identified purchasing, ordering and financial controls | | | | | | |
| Identify and obtain, where appropriate, effective and user-friendly software to underpin the initiation and/or use of identified computer systems | | | | | | |
| Integrate identified catering revenue and cost objectives and requirements into existing financial control systems, where applicable | | | | | | |
| Enter catering financial data into established control systems | | | | | | |
| Manipulate catering financial data into established control systems | | | | | | |
| Element 2: Create financial control system | | | | | | |
| Develop, or confirm an existing, effective financial control system to record and track the performance of the catering department | | | | | | |
| Input financial data into the catering department computerised control system | | | | | | |

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

| Element & Performance Criteria | Observation of skills | 3rd Party Statement | Oral Questions | Written Questions | Work Projects | Other |
|---|-----------------------|---------------------|----------------|-------------------|---------------|-------|
| Element 3: Create production control system | | | | | | |
| Develop, or confirm an existing, effective production control system to record and track the performance of the catering department | | | | | | |
| Input <i>production data</i> into the catering department computerised control system | | | | | | |
| Element 4: Respond to the results produced by the established control systems | | | | | | |
| Take action to address expenditure figures that are deemed unacceptable | | | | | | |
| Take action to address revenue figures that are deemed unacceptable | | | | | | |
| Negotiate with management to obtain revised budget figures | | | | | | |
| Candidate signature | | | Date | | | |
| Assessor signature | | | Date | | | |

William
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