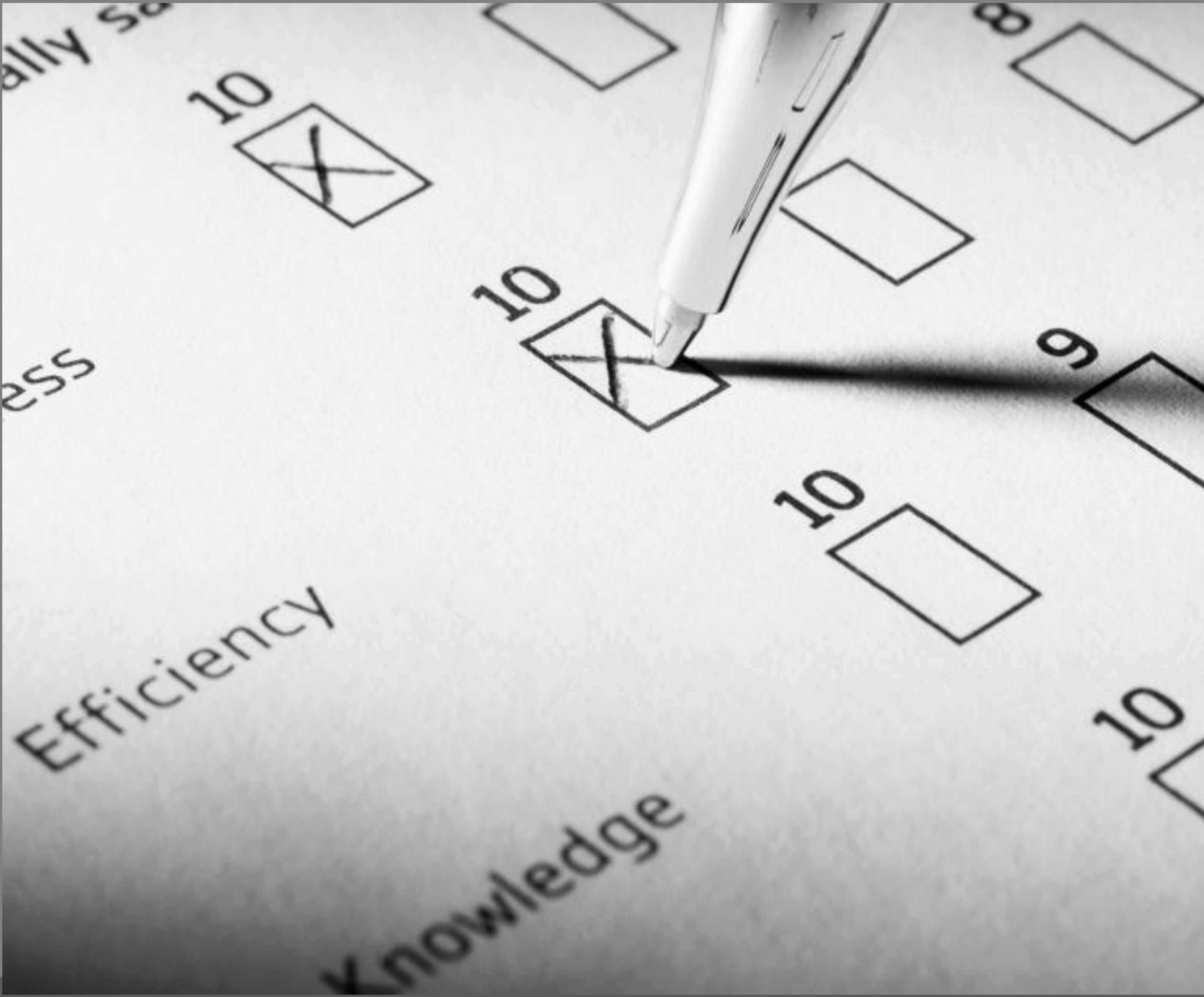
Operate a bar facility

D1.HBS.CL5.04

Assessor Manual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William Angliss Institute
Specialist centre for foods, tourism & hospitality

Operate a bar facility

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Assessor Manual

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

All text is produced by William Angliss Institute of TAFE for the ASEAN Project on “Toolbox Development for Front Office, Food and Beverage Services and Food Production Divisions”.

This publication is supported by the Australian Government’s aid program through the ASEAN-Australia Development Cooperation Program Phase II (AADCP II).

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File name: AM_Operate_a_bar_facility_refined

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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: OPERATE A BAR FACILITY	**NOMINAL HOURS:** 40
UNIT NUMBER: D1.HBS.CL5.04	
UNIT DESCRIPTOR: This unit deals with the skills and knowledge required to operate a bar facility in a range of settings within the hotel industries workplace context	
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**
Element 1: Prepare *bar* for service **1.1** Set up *bar* display and work area in accordance with enterprise requirements **1.2** Check and restock *bar products and materials* where necessary in accordance with enterprise requirements **1.3** Ensure *service equipment* is clean, operational and ready for use **1.4** *Store items* in the correct place at the correct temperature **1.5** Prepare and stock a suitable range of *garnishes and accompaniments* **Element 2: Take drink orders** **2.1** Receive customer orders **2.2** Check product and/or brand preferences with customer in a courteous manner	**Unit Variables** 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. This unit applies to all industry sectors that require to operate a bar facility within the labour divisions of the hotel and travel industries and may include: 1. Food and Beverage Service *Bar* may be: • Permanent • Temporary • Dry till. *Bar products and materials* may include: • All types of drinks • Garnishes • Cleaning equipment • Refrigeration equipment

2.3 Provide clear and helpful *recommendations or information* to customers on selection of drinks if required **Element 3: Prepare and serve drinks** **3.1** Greet customers in a polite, friendly and helpful manner **3.2** Prepare drinks in accordance with legal and enterprise standards using the correct equipment, ingredients and measures **3.3** Serve drinks promptly and courteously **3.4** Handle and use industry *standard glassware* and use garnishes and accompaniments appropriately **3.5** Minimise spillage and wastage and attend to accidents during service promptly and safely **3.6** Seek assistance from appropriate people for situations which pose a threat to safety or security of colleagues, customers or property **3.7** Seek *feedback* from customers in order to identify and implement improvements to beverage quality and take appropriate *corrective action*, if required **3.8** Deal with *unexpected situations* in accordance with enterprise procedures **Element 4: Close down bar operations** **4.1** Turn off equipment in accordance with enterprise safety procedures and manufacturer's instructions	• Utensils • Bar towels • Display items. *Service equipment* may include: • Bottle openers • Corkscrews • Measures • Glassware • Knives and chopping boards • Ice containers • Tongs and scoops • Nip pourers • Coasters • Bar mats • Refrigeration equipment • Post mix • Beer dispensers • Trays. *Store items* may relate to: • Storage cupboards • Special storage areas • Pest control measures.

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4.2 Clear, clean or dismantle bar areas in accordance with enterprise procedures **4.3** Store garnishes and accompaniments, correctly **4.4** Set up bar for next service **4.5** Handover bar, where appropriate, to incoming bar staff	*Garnishes and accompaniments* may include: • Coasters • Edible and non-edible garnishes. *Recommendations or information* may include: • Price • Special promotions • Ingredients • Relative strength • Suitable alternatives • Flavours • Value for money. *Standard glassware* may include: • Beer glass • Highball • Red wine glass • White wine glass • Tumblers • Champagne flute. *Feedback* may relate to: • Compliments • Complaints • Opinions.

Corrective action may include reporting problems to:

- Manager
- Suppliers
- Specialist staff.

Unexpected situations may include:

- Equipment breakdowns
- Power failure
- Violent incidents
- Medical emergencies
- Running out of stock
- Employee absences.

Handover may relate to:

- Customer orders
- Intoxication levels of customers
- Customer preferences
- Restocking bar products/equipment.

Assessment Guide

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

- Knowledge of the relevant liquor licensing laws
- Knowledge of hygiene issues of specific relevance to beverage service
- Knowledge of the different types of bars
- Knowledge of typical bar equipment
- Knowledge of a variety of alcoholic beverages
- Ability to demonstrate the preparation and serving of a range of standard drinks.

Linkages To Other Units

- Provide responsible service of alcohol
- Prepare and serve cocktails
- Prepare and serve non-alcoholic beverages
- Operate a cellar system
- Clean and tidy bar and food service areas
- Process a financial sale transaction.

Critical Aspects of Assessment

Evidence of the following is essential:

- Demonstrate understanding of legal requirements in relation to the service of alcohol
- Ability to demonstrate the set up and how to operate bar equipment in accordance with enterprise procedures and systems
- Ability to demonstrate offering customers assistance appropriate to situation and level of responsibility
- Ability to demonstrate the preparation and service of drinks in accordance with enterprise procedures and accepted timelines.

Context of Assessment

This unit may be assessed on or off the job

- Assessment should include practical demonstration of the ability to operate a bar either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual’s work area, job role and area of responsibility
- Assessment must include project or work activities that allow the candidate to respond to multiple and varying customer service and communication situations that require the candidate to operate a bar.

Resource Implications

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Portfolio evidence
- Problem solving
- Role plays
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

Key Competencies	**Level**	**Examples**
Collecting, organising and analysing information	0	
Communicating ideas and information	2	Use positive communication and customer service skills to provide bar service to customers

	Planning and organising activities	2	Undertake bar set up prior to service
	Working with others and in teams	2	Share relevant information with staff when executing handover to incoming bar staff
	Using mathematical ideas and techniques	0	
	Solving problems	0	
	Using technology	0	

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Operate a bar facility D1.HBS.CL5.04
Instructions	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. What you do to set up your bar for service?	☐	☐
2. How do you obtain products required by your bar for an upcoming service session?	☐	☐

Questions	Response	
	PC	NYC
3. Identify one large and one small item of bar equipment and describe how they are cleaned in order to be safe (from a food safety perspective) and presentable.	☐	☐
4. Describe how you would store the following items delivered to your bar before service commences: bottles of still white and red table wine, bottles of spirits and bottles of beer.	☐	☐
5. What garnishes would you prepare as part of the preparation activities for opening a bar for service? Why would you prepare these?	☐	☐

Questions	**Response**	
	PC	**NYC**
6. A customer has ordered 'A beer': what other information do you need in order to be able to properly fill this order?	☐	☐
7. A customer has ordered a 'Johnnie Walker and Coke': your bar does not stock Johnnie Walker scotch – how will you respond to this order?	☐	☐
8. A customer has asked you for a refreshing, non-alcoholic drink; what will you recommend?	☐	☐

Questions	Response	
	PC	NYC
9. A customer has walked into your venue and come up to the bar: how will you greet this person?	☐	☐
10. What enterprise standard and or requirements apply to the preparation of alcoholic, spirit-based mixed drinks in your workplace?	☐	☐
11. You are serving a customer with a small bottle of beer and a glass: what will you say and do as part of the service provided for this drink?	☐	☐

Questions	Response	
	PC	NYC
12. Give one rule you always follow when handling glassware when preparing drinks and one rule you always follow when putting garnishes into drinks.	☐	☐
13. What precautions do you take when working behind a bar to minimise loss caused by spillage or other wastage?	☐	☐
14. You have been threatened with assault by a customer: how might you respond to this situation?	☐	☐

Questions	Response	
	PC	NYC
15. A customer has come to the bar and told you the beer you served them was ‘warm’: how will you respond to this situation?	☐	☐
16. Give an example of an unexpected situation you have encountered and effectively dealt with while working in a bar.	☐	☐
17. What equipment do you have to turn off in your bar area at the end of trade and why does it have to be turned off?	☐	☐

Questions	Response	
	PC	NYC
18. What cleaning activities do you undertake as part of closing procedures for your bar area?	☐	☐
19. How do you store leftover garnishes at the end of trade so they can be used at the next session?	☐	☐
20. What do you when closing down the bar to help prepare it for the next session?	☐	☐

Questions	**Response**	
	PC	**NYC**
21. What is involved in handing over an open bar to a new shift of staff?	☐	☐

Written Questions

Operate a bar facility – D1.HBS.CL5.04

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. List three enterprise requirements and or standards which might apply to the set up of a bar.

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2. Identify ten activities which may be required as part of the opening procedures for a bar.

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3. What four checks need to be made of beverages behind a bar prior to service?

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4. Identify five enterprise requirements relating to re-stocking bar products.

5. What three checks should be made on refrigeration units prior to service?

6. What three checks should be made on post-mix units prior to service?

7. In relation to stock rotation what does 'FIFO' stand for?

8. At what temperature range should packaged beer be stored behind a bar?

9. Give three reasons a bar will elect to provide garnishes and decorations for drinks.

10. List five examples of ‘miscellaneous’ items which may be kept behind a bar to enhance the presentation of drinks.

11. What is the standard industry practice to ensure you have heard a drink order placed by a customer correctly?

12. A customer orders a Scotch and Coke; following standard industry practice how much Scotch would you serve, what size glass would you serve the drink in, and would you add ice or leave it out?

13. Differentiate between ‘call’ and ‘pour’ brands.

14. Identify three situations where a bar attendant may need to provide advice to customers to help them decide what to drink.

15. When advising customers about an alcoholic product list five pieces of information about the product you may provide to customers.

16. What are the three basic elements or requirements when greeting a customer?

17. Give five general examples of liquor licensing requirements bar attendants need to comply with.

18. What type of glass is commonly used to serve soft drink or fruit juice?

19. A customer has requested a ‘Scotch on the rocks’: what does this mean and what glass would it be served in?

20. What is a ‘mocktail’?

21. List seven basics elements of providing prompt and courteous service for drinks.

22. List three standard industry requirements applying to the handling of glasses.

23. List six examples of drink garnishes.

24. Identify five points to remember when making garnishes.

25. Name six types of decorations which may be used on drinks or cocktails.

26. List two requirements to adhere to when decorating drinks.

27. What is the main cause of wastage and spillage when making drinks behind a bar?

28. What is the standard procedure for cleaning up broken glass behind a bar?

29. List six examples of bar-related situations which may expose the venue to legal action.

30. Identify three situations in a bar which may impact on the safety and/or security of patrons.

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31. Identify five classifications of 'appropriate persons' to whom bar staff should report safety or security threats.

32. Identify three ways bar staff can obtain feedback from patrons about the drinks they serve.

33. What four aspects of drinks must be checked when checking for quality?

34. What action might you take in response to an unexpected power failure when working behind a bar?

35. What action might you take in response to violent incidents when working behind a bar?

36. List six examples of equipment in a bar which may need to be turned off when the bar is closed down.

37. Identify ten examples of 'closing procedures' for a bar.

38. How may cut slices of lemon, lime and oranges be stored after trade so they can be used in the next session?

39. Describe five activities required to set up a bar for the next session.

40. List five things you should ensure when handing over a bar to an incoming shift.

Answers to Written Questions

Operate a bar facility – D1.HBS.CL5.04

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. **List three enterprise requirements and or standards which might apply to the set up of a bar.**

   Set up:

   - Must support and reflect the style of service being offered
   - Needs to accommodate and embrace the equipment being used
   - Will vary with the size and layout of the bar
   - Will vary depending on staff numbers working in the bar and helping with set up tasks
   - Must comply with required food safety requirements.

2. **Identify ten activities which may be required as part of the opening procedures for a bar.**

   Any from:

   - Connecting the draught beer – where bulk beer is served:
     - Turning on instantaneous beverage chillers
     - Drawing beer through to taps and testing/examining for quality
   - Turning on espresso coffee machine
   - Setting out drip trays – with de-naturing agent – under beer fonts
   - Setting out trays and racks – ready to hold dirty glassware
   - Checking stock levels of all beverage items – where any beverage item is 'out of stock', other staff should be notified of this and effort made to order/obtain what is required
   - Collecting clean cloths/swabs, tea towels and bar runners
   - Laying out bar runners, coasters, tent cards, promotional materials and other requirements/advertising on tables as required
   - Setting ashtrays in smoking areas
   - Checking equipment and bar utensils are clean and in working
   - Placing racks of clean glassware out into their service positions – this require glasses to be placed into a glass chiller which will also need to be turned on
   - Checking glassware – to ensure they have no cracks, chips, lipstick marks: all glasses must look clean
   - Placing spirit pourers on the appropriate bottles – ensuring sufficient supply of liquor

- Preparing garnishes
- Checking bar displays and all promotional material – refilling as required
- Re-stocking accessories for cocktails – straws, decorations, glassware
- Stacking and ensuring cleanliness of service trays
- Filling up ice buckets/tubs
- Collecting cash drawer and placing/counting in cash register – checking/replacing register journal/audit roll.

3. What four checks need to be made of beverages behind a bar prior to service?

- Sufficient quantities of all items to meet expected trade
- Juices, milk and cream have not exceeded their 'best before' or 'use by' dates
- Stock is readily accessible
- Back-up supplies are available.

4. Identify five enterprise requirements relating to re-stocking bar products.

- Only the supervisor may be allowed/authorised to order stock
- A requisition must be used to order all stock
- Stock can only be ordered to re-stock the bar to a nominated par level
- An inter-departmental transfer form must be completed if stock is taken/borrowed from another bar/department
- All stock delivered to a bar must be immediately secured and/or 'put away/placed behind the bar or under refrigeration (as appropriate)
- New stock delivered to the bar must be rotated using the FIFO method – meaning new stock is placed behind old stock.

5. What three checks should be made on refrigeration units prior to service?

- Clean
- Stocked
- Operating at correct temperature.

6. What three checks should be made on post-mix units prior to service?

- Clean
- Correct brixing
- Correct temperature.

7. In relation to stock rotation what does 'FIFO' stand for?

First In, First Out.

8. At what temperature range should packaged beer be stored behind a bar?

1°C – 3°C.

9. Give three reasons a bar will elect to provide garnishes and decorations for drinks.

- To meet customer expectations
- To meet competition
- To differentiate the establishment from the opposition.

10. List five examples of 'miscellaneous' items which may be kept behind a bar to enhance the presentation of drinks.

- Coasters
- Decorations – animal figures, umbrellas and the traditional mermaid
- Edible garnishes – usually lemon and orange slices
- Non-edible garnishes – includes hollowed-out pineapples for eye-catching cocktails
- Drinking straws.

11. What is the standard industry practice to ensure you have heard a drink order placed by a customer correctly?

Repeat it back to the customer.

12. A customer orders a Scotch and Coke; following standard industry practice how much Scotch would you serve, what size glass would you serve the drink in, and would you add ice or leave it out?

- 30 mls Scotch
- Long glass/approx 200 mls
- With ice.

13. Differentiate between 'call' and 'pour' brands.

- A 'pour' brand (sometimes referred to as a 'house' brand) is the brand of spirit (or other drink such as liqueurs or wine) used/poured if a customer does not specify a brand name
- A 'call' brand is the brand specified by/called out by the customer.

14. Identify three situations where a bar attendant may need to provide advice to customers to help them decide what to drink.

- Customers are unsure about what they would like – sometimes regular customers come in and they are just bored with their normal drink, and want something a bit different
- Customers who have never been in the bar before are uncertain about what you have available

- The drink or brand customers have ordered is unavailable
- It is a special occasion for the customer or group – perhaps they have just won a promotion, had a baby, or are celebrating a birthday
- You have a new product in stock
- The customer is feeling 'off colour' or a bit low
- They are dining
- They do not want to drink alcohol, or they need to limit their alcohol intake.

15. When advising customers about an alcoholic product list five pieces of information about the product you may provide to customers.

- Price
- Special promotions current at the time
- Details of the beverage – taste, aroma, colour, ingredients
- Imported or domestic
- Options for service/consumption
- Alcoholic strength
- Special points – awards won, popularity, competitions.

16. What are the three basic elements or requirements when greeting a customer?

Greeting must be polite, friendly and helpful.

17. Give five general examples of liquor licensing requirements bar attendants need to comply with.

- The age of people who can be served with liquor
- The age of people who can be in licensed venues – even though they are not consuming alcohol
- Hours liquor is allowed to be served
- Whether liquor can be served for drinking on or off the premises
- The areas from which liquor can be served/sold
- Who may be served with alcohol – prohibitions may apply to certain classes of people
- Behaviour of people on licensed premises.

18. What type of glass is commonly used to serve soft drink or fruit juice?

Highball.

19. A customer has requested a 'Scotch on the rocks': what does this mean and what glass would it be served in?

- Scotch (30 mls) served over ice: nothing else added
- Old fashioned glass.

20. What is a 'mocktail'?

A non-alcoholic cocktail

21. List seven basics elements of providing prompt and courteous service for drinks.

- Thank the customer for placing the order
- Fill the order as quickly as possible
- Interpret the order properly and comply with requests or comply with house recipes
- Never sacrifice accuracy and cleanliness of drink preparation for speed
- Use the right glass for the right drink
- Never over-fill glasses.
- Follow required mixing/preparation methods
- Serve the drink as soon as possible
- Name the drink as it is presented
- Thank the customer
- Offer a pleasant sentiment – 'Enjoy!'

22. List three standard industry requirements applying to the handling of glasses.

- Check all glasses before using them or offering them – no cracks, no chips: they must be clean
- Use the same type of glass for the same type of drink – to give consistency
- Handle glasses by stem or base – not by top/rim
- Be careful – glasses are fragile and easily broken.

23. List six examples of drink garnishes.

- Citrus slices – half and full: full slices are also known as 'citrus wheels'
- Maraschino cherries – speared on to either one or two toothpicks
- Olives – speared on a toothpick, traditional with a dry martini
- Pineapple, and citrus wedges – pineapple done like this is also called 'pineapple spears'. Pineapples may also be hollowed out and used as the 'glass'/service item for some cocktails
- Citrus twists – the twisted zest of citrus fruits
- Celery rib – used traditionally for a Bloody Mary
- Sprigs of fresh herbs – rosemary, thyme and mint are common
- Kiwi fruit – half or full slices
- Chocolate powder – sprinkled on top of the finished drink
- Whole strawberries – or sliced strawberries (sometimes chocolate-dipped)

- Nutmeg – as above
- A range of other products can be added to different, more modern cocktails – coffee beans, liquorice sticks, jelly beans, jelly babies.

24. Identify five points to remember when making garnishes.

- Always use a clean surface when cutting garnishes
- Always have plenty of fresh garnishes prepared before service
- Always store garnishes under refrigeration
- At the end of trading, all garnish containers should be sealed with a lid or a good quality clear wrap
- Never re-use garnishes that come back from the table/customer – they may be contaminated
- Staff not permitted to eat the garnishes – or the raw materials from which they are made.

25. Name six types of decorations which may be used on drinks or cocktails.

- Paper parasols
- Plastic animals – monkey, giraffe, dolphin, elephant
- Mermaids
- Pickaxes
- Doilies – sometimes placed under drinks
- Swizzle sticks
- Sparklers
- Straws.

26. List two requirements to adhere to when decorating drinks.

- Make sure only the amount of decorations are used as specified in house recipes – no more, no less
- Never over-decorate – the finished product should look like a drink or cocktail and not a fruit salad.

27. What is the main cause of wastage and spillage when making drinks behind a bar?

Rushing.

28. What is the standard procedure for cleaning up broken glass behind a bar?

Using a dustpan and brush.

29. List six examples of bar-related situations which may expose the venue to legal action.

Anyone whose presence on the premises renders the business liable to an offence under the liquor licensing legislation is cause for concern – this may be someone who is:

- Under legal drinking age
- Intoxicated
- Drunk
- Violent
- Gambling in a way prohibited by law for the venue
- Disorderly – annoying others; making too much noise; not behaving in an acceptable way
- Trying to obtain liquor for someone who has been refused service
- The subject of an exclusion order
- Quarrelsome/argumentative
- Trying to obtain liquor outside licensed hours
- Unable to be served with alcohol given the type of licence in operation
- Identified by legislation as not being allowed on licensed premises – this will vary between countries and may include known prostitutes, known criminals and/or people who associate with known prostitutes or criminals.

30. Identify three situations in a bar which may impact on the safety and or security of patrons.

- Customers who are drunk, violent and quarrelsome
- Patrons who are threatening or intimidating others
- People who are fighting
- Extreme weather events
- Equipment breakdowns which pose a hazards
- Gate crashers
- Power failures
- Emergency situations – such as fire, gas leaks, any situation creating a need for evacuation.

31. Identify five classifications of 'appropriate persons' to whom bar staff should report safety or security threats.

- Supervisor
- Bar manager
- Duty manager
- Security

- Front desk/office
- Owner.

32. Identify three ways bar staff can obtain feedback from patrons about the drinks they serve.

- Ask for feedback – verbally or by asking customers to complete a 'Customer Comment/Feedback' form
- Listen to what customers are saying to each other
- Observe customer body language
- Note the drinks which are being left unfinished
- Encourage feedback – tell customers to let you know if they have compliment, complaint or opinion they want to share.

33. What four aspects of drinks must be checked when checking for quality?

- Temperature
- Taste
- Smell
- Aroma.

34. What action might you take in response to an unexpected power failure when working behind a bar?

- Notify management or Maintenance
- Implement EMP for 'power failure' – evacuate customers; activate emergency/stand-by generator; verify emergency lighting has activated
- Protect assets/cash
- Urge people to keep calm
- Use ice to chill bottles and cans
- Switch to manual operation of POS registers/terminals.

35. What action might you take in response to violent incidents when working behind a bar?

- Notify management or Security
- Implement EMP for 'violent incidents'
- Never place self in danger – do not intervene
- Move customers to safety
- Ask people to modify their behaviour
- Contact police/authorities – if scope of authority allows.

36. List six examples of equipment in a bar which may need to be turned off when the bar is closed down.

- Instantaneous beverage chillers
- Radio, tape, CD or other music source, PA systems, televisions
- Heating or air conditioning units
- Lighting
- Coin-operated entertainment units
- Vending machines
- Advertising signs
- Glass chillers – so they can defrost overnight and be ready to clean the next morning
- Coffee machine/s.

37. Identify ten examples of 'closing procedures' for a bar.

- Disconnecting the draught beer – turning off beer chillers (where applicable) and running water through the lines and leaving lines wet or dry depending on house policy
- Washing the drip trays from under beer fonts, post-mix units, espresso machines and glass racks, and allowing to air dry
- Cleaning all dirty glassware and storing them in appropriate places
- Checking stock levels of all beverage items including beer, wine, spirits, liqueurs, mixers, bottled water, milk, cream, fruit juices, and re-ordering as necessary
- Collecting all dirty bar runners, tea towels, swabs and cloths and placing them in the laundry
- Discarding all used/dirty coasters – keeping suitable ones for next service
- Collecting and washing all ashtrays
- Checking all equipment and bar utensils are clean and in good working order
- Placing appropriate spirit pourers into soda water to soak overnight
- Covering all garnishes and perishable items and storing under refrigeration – throw out items as necessary
- Cleaning, drying and stacking service trays
- Emptying and cleaning ice buckets
- Turning off, dismantling and cleaning espresso coffee machine
- Removing all rubbish from bar areas and cleaning the internal rubbish bins
- Emptying the empty-bottle bin/s
- Cleaning all surfaces
- Sweeping and mopping the floor

- Counting/reconciling the takings and transporting same to a central secure area/safe
- Checking to ensure the bar is presentable and ready for the next service.

38. How may cut slices of lemon, lime and oranges be stored after trade so they can be used in the next session?

- Covering slices with (soda) water and refrigerating them – an alternative is to just cover them with plastic film and refrigerate.

39. Describe five activities required to set up a bar for the next session.

- Washing and putting away all glassware
- Fresh bar linen may be stacked behind the bar
- Any available stock must be stored away
- Staff communication book to be completed where necessary
- Complete necessary ‘Maintenance Request’ forms
- Cleaning of items and areas.

40. List five things you should ensure when handing over a bar to an incoming shift.

- The bar is clean and in good order
- Change/money in the cash register is sufficient for the next shift
- Information about particular customers in the bar is passed on
- Information about customer complaints and operational problems is passed on – covering all relevant details
- Customer orders are addressed – if there is a customer order which has been taken but not filled this must be communicated to in-coming staff
- Customer preferences are passed on – if a certain customer is drinking a certain brand of spirits, beer or wine this should be shared with staff who will be serving that customer
- The bar is as well-stocked as possible – this may necessitate obtaining more stock to allow the next shift to trade as expected.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Operate a bar facility D1.HBS.CL5.04
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Prepare bar for service b) Take drink orders c) Prepare and serve drinks d) Close down bar operations 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: Prepare bar for service		
Set up bar display and work area in accordance with enterprise requirements	☐	☐
Check and restock bar products and materials where necessary in accordance with enterprise requirements	☐	☐
Ensure service equipment is clean, operational and ready for use	☐	☐
Store items in the correct place at the correct temperature	☐	☐
Prepare and stock a suitable range of garnishes and accompaniments	☐	☐
Element 2: Take drink orders		
Receive customer orders	☐	☐

Check product and/or brand preferences with customer in a courteous manner	☐	☐
Provide clear and helpful recommendations or information to customers on selection of drinks if required	☐	☐
Element 3: Prepare and serve drinks		
Greet customers in a polite, friendly and helpful manner	☐	☐
Prepare drinks in accordance with legal and enterprise standards using the correct equipment, ingredients and measures	☐	☐
Serve drinks promptly and courteously	☐	☐
Handle and use industry standard glassware and use garnishes and accompaniments appropriately	☐	☐
Minimise spillage and wastage and attend to accidents during service promptly and safely	☐	☐
Seek assistance from appropriate people for situations which pose a threat to safety or security of colleagues, customers or property	☐	☐
Seek feedback from customers in order to identify and implement improvements to beverage quality and take appropriate corrective action, if required	☐	☐
Deal with unexpected situations in accordance with enterprise procedures	☐	☐
Element 4: Close down bar operations		
Turn off equipment in accordance with enterprise safety procedures and manufacturer's instructions	☐	☐
Clear, clean or dismantle bar areas in accordance with enterprise procedures	☐	☐
Store garnishes and accompaniments, correctly	☐	☐
Set up bar for next service	☐	☐
Handover bar, where appropriate, to incoming bar staff	☐	☐
Did the student's overall performance meet the standard?	☐	☐

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:	☐ Employer ☐ Supervisor ☐ Colleague ☐ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Operate a bar facility D1.HBS.CL5.04		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Sets up bar display and work area prior to service including checking and restock bar products and materials	☐	☐	☐
Ensures service equipment is clean, operational and ready for use	☐	☐	☐
Stores items in the correct place at the correct temperature	☐	☐	☐
Prepares and stocks garnishes and accompaniments	☐	☐	☐
Takes customer orders, checks preferences and provides assistance and recommendations as required	☐	☐	☐
Greets customers in a polite, friendly and helpful manner	☐	☐	☐
Prepares and serves drinks handling glassware and equipment while minimising spillage and waste	☐	☐	☐
Seeks assistance from appropriate people for situations which pose a threat to safety or security of colleagues, customers or property	☐	☐	☐
Seeks feedback from customers about drinks and takes corrective action, if required	☐	☐	☐
Deals with unexpected situations in accordance with enterprise procedures	☐	☐	☐

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Closes down bar at end of service turning off equipment and cleaning items as required, or conducts handover	☐	☐	☐
Stores products as appropriate for next service session	☐	☐	☐
Sets up bar for next service	☐	☐	☐

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	Operate a bar facility	D1.HBS.CL5.04
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: Prepare bar for service						
Set up bar display and work area in accordance with enterprise requirements						
Check and restock bar products and materials where necessary in accordance with enterprise requirements						
Ensure service equipment is clean, operational and ready for use						
Store items in the correct place at the correct temperature						
Prepare and stock a suitable range of garnishes and accompaniments						
Element 2: Take drink orders						
Receive customer orders						
Check product and/or brand preferences with customer in a courteous manner						
Provide clear and helpful recommendations or information to customers on selection of drinks if required						

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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: Prepare and serve drinks						
Greet customers in a polite, friendly and helpful manner						
Prepare drinks in accordance with legal and enterprise standards using the correct equipment, ingredients and measures						
Serve drinks promptly and courteously						
Handle and use industry standard glassware and use garnishes and accompaniments appropriately						
Minimise spillage and wastage and attend to accidents during service promptly and safely						
Seek assistance from appropriate people for situations which pose a threat to safety or security of colleagues, customers or property						
Seek feedback from customers in order to identify and implement improvements to beverage quality and take appropriate corrective action, if required						
Deal with unexpected situations in accordance with enterprise procedures						

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 4: Close down bar operations						
Turn off equipment in accordance with enterprise safety procedures and manufacturer's instructions						
Clear, clean or dismantle bar areas in accordance with enterprise procedures						
Store garnishes and accompaniments, correctly						
Set up bar for next service						
Handover bar, where appropriate, to incoming bar staff						
Candidate signature			**Date**			
Assessor signature			**Date**			

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