

# PPL 4GEN2(SQA Unit code-H2YA 04)

## Manage purchasing costs in hospitality



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### Overview

This standard is about ensuring you effectively control the cost of resources you have responsibility for purchasing.

This includes effective management of supplier contracts, invoices, and ensuring your team use resources with optimum efficiency, avoiding unnecessary wastage wherever possible.

# PPL 4GEN2(SQA Unit Code-H2YA 04)

## Manage purchasing costs in hospitality

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### Performance criteria

*You must be able to:*

- P1 Negotiate with suppliers in way that maximises the potential for profit, within the limits of your own authority, whilst adhering to your organisation's quality criteria
- P2 Liaise with leadership team colleagues to identify resources that are most cost-effective to purchase 'en masse'
- P3 Monitor the effective use of your organisation's preferred supplier lists, for all areas where one exists
- P4 Benchmark purchasing costs against those of other potential suppliers
- P5 Ensure company procedures for using purchase orders are followed
- P6 Monitor supplier invoices for accuracy, dealing with discrepancies within the limits of your authority
- P7 Identify key staff who will assist you in the effective reduction of resource costs
- P8 Develop a system for checking deliveries against orders, ensuring discrepancies (including damage or defects) are reported as they occur
- P9 Ensure your team has the required knowledge to be able to check delivered supplies against agreed criteria (e.g. quality points, condition, expiry dates)
- P10 Follow up effectively with suppliers to retrieve costs where resources are not supplied as agreed
- P11 Monitor the appropriate storage of resources, and that storage is adhering to principles of stock rotation
- P12 Ensure any damage or defect to existing resources is reported and logged as soon as possible
- P13 Establish a rigorous system of waste management within your area of responsibility, minimising resource waste wherever possible
- P14 Develop procedures which promote sustainability amongst colleagues and guests

# PPL 4GEN2(SQA Unit Code-H2YA 04)

## Manage purchasing costs in hospitality

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### Knowledge and understanding

*You need to know and understand:*

- K1 The limits of your own authority to negotiate with suppliers, and how to do this effectively
- K2 Economies of scale, and how these can work to your advantage when purchasing resources
- K3 Your organisation's preferred supplier lists, where these exist
- K4 The correct criteria to use when benchmarking different potential suppliers
- K5 The latest developments regarding suppliers to the hospitality industry, why it is important to keep up-to-date with this
- K6 Company purchase order procedures
- K7 How to monitor invoices for accuracy, and how to deal with any discrepancies identified
- K8 The key procedures that need to be incorporated into a system for checking deliveries
- K9 The key acceptance criteria (e.g. quality points, condition, expiry dates) for supplied resources, and how to ensure your team applies these
- K10 Why it is important that damage, defects or discrepancies with existing resources are dealt with as soon as possible
- K11 The terms and conditions under which resources are supplied, and how to obtain suitable recompense where these are not met
- K12 The appropriate storage conditions for your team's resources, and how to monitor these
- K13 Principles of stock control and rotation
- K14 How to establish a waste management system within your area of responsibility, and how this helps to reduce costs
- K15 Good sustainability practices in the hospitality industry, and how to promote these within your organisation

# PPL 4GEN2(SQA Unit Code-H2YA 04)

## Manage purchasing costs in hospitality

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### Scope/range

#### 1 Resources

1.1 stock

1.2 equipment

## **PPL 4GEN2(SQA Unit Code-H2YA 04)**

### Manage purchasing costs in hospitality

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Purchasing; stock; equipment; resources; procedures; suppliers; hospitality

# PPL 4GEN3(SQA Unit Code-H2YB 04)

## Manage payroll costs for your team



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### Overview

This standard is about managing payroll costs for the hospitality team to ensure that staffing is as cost-effective as possible, within budget, whilst meeting operational needs effectively.

## PPL 4GEN3(SQA Unit Code-H2YB 04)

### Manage payroll costs for your team

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#### Performance criteria

*You must be able to:*

- P1 Take into account all the direct and indirect costs of employing people when deciding what to spend on staffing, including the costs of meeting any legal obligations to your staff
- P2 Use the appropriate balance of permanent, temporary and casual hospitality staff, as appropriate to fluctuating levels of operational activity
- P3 Ensure your team provide the correct documentation which enables payroll to be processed accurately and on time
- P4 Use an efficient and effective system for gathering, recording, storing and retrieving payroll information
- P5 Periodically check payroll data against actual records of hours worked, dealing promptly with any discrepancies
- P6 Review payroll costs against your allocated staffing budget on a regular basis, identifying potential cost savings where appropriate
- P7 Review your payroll system on a regular basis for accuracy, within the limits of your responsibility
- P8 Deal effectively with payroll queries from your staff within the limits of your responsibility
- P9 Negotiate with recruitment agencies when necessary, in order to meet operational needs, whilst remaining within budget
- P10 Follow organisational and regulatory procedures for keeping personal data confidential
- P11 Refer payroll queries to the appropriate person when you do not have the authority or expertise to resolve them, and follow these queries through to resolution
- P12 Assist management colleagues by supplying requested work-related management information about your team, as and when this is required

## PPL 4GEN3(SQA Unit Code-H2YB 04)

### Manage payroll costs for your team

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#### Knowledge and understanding

*You need to know and understand:*

- K1 The options available for employing hospitality staff – such as temporary, permanent, casual or agency staff, and full-time or part-time – and the potential advantages and disadvantages of each option
- K2 How to work out the direct and indirect costs of different staffing levels and options, including the costs of meeting any legal obligations to staff
- K3 The various types of documentation that are needed to process staff payroll accurately and in line with legal and organisational requirements
- K4 The main differences in documentational requirements between UK, EU and non- EU members of staff
- K5 The organisation's payroll cut-off dates, and the implications for both your team and the organisation, of not meeting these
- K6 Which features of your payroll system are essential for your management needs, and how to use them effectively
- K7 How to check payroll data against actual records of hours worked
- K8 Why it is important to keep personal data confidential, and the organisational procedures for doing so
- K9 How to identify potential cost savings in relation to staffing, without affecting staff morale or efficiency
- K10 The limits of your own authority when dealing with payroll queries, and who to refer queries to when these are exceeded



# PPL 4GEN3(SQA Unit Code-H2YB 04)

## Manage payroll costs for your team

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**Suite** Hospitality Management

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**Key words** Payroll; staff; recruitment; agency; costs

# PPL 4GEN4(SQA Unit Code-H2YC 04)

## Manage rotas for your hospitality team



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### Overview

This standard is about developing staff rotas, to ensure that sufficient appropriately trained staff are on duty in the establishment at all times. You will be required to produce clear precise plans and schedules. Scheduling should take account of relevant legislation and of staff contracts of employment.

# PPL 4GEN4(SQA Unit Code-H2YC 04)

## Manage rotas for your hospitality team

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### Performance criteria

*You must be able to:*

- P1 Develop hospitality operational staffing plans that cover all operational needs within your area of responsibility
- P2 Ensure annual leave and sickness levels are factored into staffing plans
- P3 Produce hospitality staffing plans that include accurate numbers, appropriate levels of skill, work allocation, work locations, and start and finish times
- P4 Plan your team's scheduled activities in a way that maximises each individual's skills and increases their productivity
- P5 Schedule hours of work that adhere to relevant legislation, company policy and contracts of employment
- P6 Produce rotas that are easy for all types of hospitality staff to understand and use
- P7 Develop staffing plans and shift patterns for your team which complement the peaks and troughs of organisational business activity
- P8 Develop contingency staffing plans to cope with unplanned situations or ad-hoc increased workloads
- P9 Balance the individual needs of your team members and the operational requirements of the organisation when developing hospitality staffing plans
- P10 Ensure the rota system for your hospitality team is fair and impartial
- P11 Ensure that rotas are circulated with sufficient notice and communicated to all stakeholders
- P12 Manage absence-related issues using the appropriate organisational tools and guidelines

# PPL 4GEN4(SQAUnit Code-H2YC 04)

## Manage rotas for your hospitality team

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### Knowledge and understanding

*You need to know and understand:*

- K1 Relevant legislation, company policy and contract terms and conditions which may affect the hours that hospitality staff may work
- K2 The pool of skills that will be needed to meet operational needs
- K3 Your team's individual skill-sets, and how best to utilise these to the benefit of the organisation
- K4 The number of staff needed to meet operational needs
- K5 How to produce and present staffing plans in a form suitable for the understanding of all levels of hospitality staff
- K6 How to develop staffing plans and shift patterns for your team which complement the forecasted peaks and troughs of organisational business activity
- K7 How to build in contingency staffing plans to cope with unplanned situations which require ad-hoc increased or reduced staffing
- K8 How to be fair and impartial when developing rotas
- K9 How to use 'split-shifts' in a hospitality environment, in a way that complements peaks and troughs of business activity, without placing excessive demands on your team members
- K10 The needs and circumstances of individual team members in relation to their normal working patterns
- K11 The organisation's procedures and tools used to manage staff absence, and how to use these effectively

## PPL 4GEN4(SQA Unit Code-H2YC 04)

### Manage rotas for your hospitality team

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#### Glossary

##### **Types of hospitality staff**

This refers to the different working arrangements under which hospitality staff are often employed, e.g. full-time, part-time, seasonal, casual, as well as different levels and types of staff who may use the rotas and plans.

## PPL 4GEN4(SQA Unit Code-H2YC 04)

### Manage rotas for your hospitality team

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**Key words** Team; hospitality; rota; schedule; shift; staffing; plans

## PPL 4GEN5(SQA Unit Code-H2YD 04)

### Obtain, analyse and implement customer feedback



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#### Overview

This standard is about obtaining and analysing customer feedback for your area of responsibility, using this as a vital tool in managing the performance of your team.

You must also be able to effectively use this feedback to modify objectives and processes, where this will improve performance.

# PPL 4GEN5(SQA Unit Code-H2YD 04)

## Obtain, analyse and implement customer feedback

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### Performance criteria

*You must be able to:*

- P1 Consult with management colleagues to identify the areas on which feedback is required
- P2 Develop and/or use systems to obtain feedback which meet your organisation's requirements
- P3 Ensure that feedback on your area is also captured via wider company feedback systems
- P4 Collect and analyse feedback from customers and staff
- P5 Benchmark both quantity and quality of feedback against that obtained by competitors, where this is possible
- P6 Match customer profiles / types to customer feedback
- P7 Use external sources to support your analysis of customer feedback
- P8 Review feedback against organisational expectations
- P9 Evaluate how effectively agreed outcomes and processes are being achieved
- P10 Communicate analysis results to your team in an appropriate manner and at the appropriate time
- P11 Use feedback to improve work processes and manage staff performance
- P12 Report concisely to the senior management team on your actions with feedback, identifying areas where management colleagues could benefit from your experience



## PPL 4GEN5(SQA Unit Code-H2YD 04)

### Obtain, analyse and implement customer feedback

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#### Knowledge and understanding

*You need to know and understand:*

- K1 Your organisation's policy, procedures, and systems for obtaining customer feedback
- K2 Organisational standards and expectations
- K3 How to develop and implement your own procedures for obtaining customer feedback, whilst adhering to organisational guidelines
- K4 Basic research methods to identify data sources which support your methodology and analysis
- K5 The difference between qualitative and quantitative customer feedback, and how both can be used to inform analysis
- K6 How to benchmark the quality of your customer feedback
- K7 Legislation regarding customer information
- K8 Legitimate uses of customer information
- K9 How to create and interpret customer profiles
- K10 Appropriate times, places and ways in which to communicate feedback analysis to your team
- K11 How to use feedback to modify your team's way of working
- K12 When feedback received could be of importance to the wider organisation, and to whom this should be reported

# PPL 4GEN5(SQA Unit Code-H2YD 04)

## Obtain, analyse and implement customer feedback

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### Scope/range

#### **1 Feedback**

- 1.1 ad-hoc / face-to-face
- 1.2 systemised
- 1.3 customer complaints
- 1.4 external sources

#### **2 Customer profiles**

- 2.1 age
- 2.2 gender
- 2.3 booking type (e.g. Leisure / Business)
- 2.4 social demographics

## PPL 4GEN5(SQA Unit Code-H2YD 04)

Obtain, analyse and implement customer feedback

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**Suite** Hospitality Management

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**Key words** Obtain; analyse; implement; customer; feedback; analyse; benchmark

## PPL 4GEN6(SQA Unit Code-H2YE 04)

### Lead, manage and follow up the meeting process



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#### Overview

This standard is for managers in hospitality organisations who will have responsibility for planning, organising, and managing meetings. These may be your own team meetings, other internal meetings involving colleagues and/or external participants.

## PPL 4GEN6(SQA Unit Code-H2YE 04)

### Lead, manage and follow up the meeting process

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#### Performance criteria

*You must be able to:*

- P1 Establish the purpose and objectives of the meeting and confirm that a meeting is the best way to achieve these objectives
- P2 Identify a suitable meeting place, which is both cost-effective and suitable for the purposes of the meeting
- P3 Identify all required participants, advising them with sufficient notice of the time, location, content and purpose of the meeting, and their roles in it
- P4 Design an agenda which covers all established objectives, whilst retaining sufficient flexibility to cover additional items as necessary
- P5 Disseminate any associated information to participants prior to the meeting
- P6 Prepare yourself and any materials for the meeting in a way that will help you achieve your objectives
- P7 Run the meeting to time by adhering to allocated time slots for each item, or by adjusting current and following time slots when an item needs extra discussion to achieve your objective
- P8 Communicate clearly in a way that ensures all present understand all points being discussed
- P9 Ensure all staff present have a fair opportunity to make their point as desired
- P10 Summarise discussion and allocate action points with timescales to staff, where these have been decided during the meeting
- P11 Take decisions within the meeting where you have the authority to do so
- P12 Ensure all decisions, action points, and other minutes are recorded and distributed to all relevant stakeholders in a timely fashion
- P13 Follow up on action points after the meeting to ensure they are implemented within the designated timescales
- P14 Raise recurrent themes to the organisational leadership team, when additional help is needed to achieve an objective
- P15 Reflect on your overall management of the meeting, and identify any learning points which will improve your performance at future meetings

# PPL 4GEN6(SQA Unit Code-H2YE 04)

## Lead, manage and follow up the meeting process

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### Knowledge and understanding

*You need to know and understand:*

- K1 The importance of establishing the purpose and objectives of the meeting and how to do so in a way that ensures they relate to organisational needs
- K2 The key considerations when establishing the suitability of a meeting venue
- K3 The key aspects of agenda writing, and how sequence and timings can influence the effectiveness of meetings
- K4 What information needs to be available to delegates prior to the meeting, and how to disseminate this effectively
- K5 How to prepare yourself to lead a meeting
- K6 What materials will assist you to lead a meeting effectively
- K7 How to keep agenda items to their respective time slots, and when you should be flexible with this rule
- K8 How to manage both internal and external disruptions to meetings.
- K9 The possible barriers to effective communication with the particular audience you have
- K10 Which procedures and products will be a regular feature of meetings, and their importance to the organisation
- K11 How to give a fair chance to contribute to all meeting delegates
- K12 The appropriate colleagues responsible for action points, and the timescales needed to make those actions effective
- K13 The limits of your authority to make decisions within meetings
- K14 How to delegate minute-taking fairly, and ensure organisational style and documentation is used
- K15 Who the relevant stakeholders are in terms of receiving minutes and actions from a meeting, including those not in attendance
- K16 The consequences of not following up on agreed action points
- K17 When you should raise issues arising from meetings to other senior colleagues
- K18 How to use feedback to improve your performance in meetings
- K19 The importance of self-reflection in the learning process

## PPL 4GEN6(SQA Unit Code-H2YE 04)

Lead, manage and follow up the meeting process

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Lead; organise; manage; meeting; agenda; stakeholders; objectives

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### Overview

This standard is about recruiting and selecting people to undertake identified activities or work roles within your area of responsibility. It involves taking a fair and objective approach to recruitment and selection to ensure that the right individuals are appointed.

As recruitment and selection can be expensive and time-consuming activities, the standard also involves taking action to understand why colleagues are leaving and to attempt to address any staff turnover issues.

Whilst you would be likely to draw on the expertise of personnel specialists, you are not expected to be a personnel specialist yourself.



## PPL 4GEN7(SQA Unit Code-H2YF 04)

### Recruit and select hospitality staff

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#### Performance criteria

*You must be able to:*

- P1 Review, on a regular basis, the work required in your area of responsibility, identifying any shortfall in the number of colleagues and/or the pool of skills, knowledge, understanding and experience
- P2 Identify and review the options for addressing any identified shortfalls and consult with others on the best option(s) to follow
- P3 Consult with others to produce or update job descriptions and person specifications where there is a clear need to recruit
- P4 Consult with others to discuss and agree stages in the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved in the process
- P5 Review information on vacancies and ensure it is fair, clear and accurate before roles are advertised
- P6 Seek and make use of specialist expertise in relation to recruiting, selecting and retaining colleagues
- P7 Ensure that the skills needed to be demonstrated by applicants to succeed in the recruitment process are no more than are required to perform the job
- P8 Ensure that all applicants have the necessary legal permissions to work in the country in which the role is based
- P9 Ensure that personality, attitude and desire, in relation to the team's and organisation's ethos, are factored into the selection criteria
- P10 Participate in the recruitment and selection process, as agreed, making sure that the process is fair, consistent, effective and complies with relevant anti-discrimination legislation
- P11 Manage the use of recruitment agencies to ensure correct procedures are in place before selecting agency staff
- P12 Manage the use of trial/probationary periods effectively, ensuring successful candidates are fully aware of these
- P13 Evaluate the recruitment and selection process in relation to recent appointments in your area and identify any areas for improvements
- P14 Reflect on your own performance as a manager and consider the impact this has had on staff retention
- P15 Talk with colleagues who are leaving your area of responsibility to identify and discuss their reasons for leaving
- P16 Identify ways of addressing staff turnover problems, implementing those which clearly fall within your authority and communicating others to the relevant people for consideration

# PPL 4GEN7(SQA Unit Code-H2YF 04)

## Recruit and select hospitality staff

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### Knowledge and understanding

*You need to know and understand:*

- K1 How to review the workload in your area in order to identify shortfalls in the number of colleagues and/or the pool of skills, knowledge, understanding and experience
- K2 Different options for addressing identified shortfalls and their associated advantages and disadvantages
- K3 What job descriptions and person specifications should cover and why it is important to consult with others when producing or updating them
- K4 Why it is important to recruit colleagues with the personality and attitude to complement your organisation's values and culture
- K5 The documentation required by applicants which prove their right to work in the country, in which the role is based
- K6 Different stages in the recruitment and selection process and why it is important to consult with others on the stages, recruitment and selection methods to be used, associated timings and who is to be involved
- K7 Different recruitment and selection methods and their associated advantages and disadvantages
- K8 The implications of using agencies to fulfill your staffing needs
- K9 Why it is important to give fair, clear and accurate information on vacancies to potential applicants
- K10 Relevant anti-discrimination legislation, and how to ensure selection processes meet these
- K11 How to judge whether applicants meet the stated vacancy requirements
- K12 How to use references to assist the selection process
- K13 Sources of specialist expertise in relation to recruitment, selection and retention
- K14 How to take account of equality and diversity issues, including legislation and any relevant codes of practice, when recruiting and selecting people and retaining colleagues
- K15 How judicious use of trial/probationary periods can benefit the recruitment process
- K16 Why it is important to understand why colleagues are leaving and how to use this information constructively
- K17 How to measure staff turnover and the causes and effects of high and low staff turnover
- K18 Measures which can be undertaken to address staff turnover problems

# PPL 4GEN7(SQA Unit Code-H2YF 04)

## Recruit and select hospitality staff

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**Suite** Hospitality Management

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**Key words** Recruit; select; hospitality; staff; recruitment; interview

# PPL 4GEN8(SQA Unit Code-H2Y7 04)

## Manage the performance of teams and individuals



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### Overview

This standard is about making the best use of your team and its members so that they can help to achieve your organisation's objectives. It covers allocating work, agreeing objectives, and setting out plans and methods of working. It also involves monitoring and evaluating your team's work and providing feedback to them on their performance.

# PPL 4GEN8(SQA Unit Code-H2Y7 04)

## Manage the performance of teams and individuals

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### Performance criteria

#### Agree objectives and work plans with teams and individuals

*You must be able to:*

- P1 Give opportunities to your team members to help define their own objectives and work plans
- P2 Establish objectives and work plans which are consistent with team and organisational objectives and agree these with all staff in your area of responsibility
- P3 Establish objectives, work plans and schedules which are specific, measurable, achievable, realistic and time bound (S.M.A.R.T.)
- P4 Establish objectives and work plans which take account of team members' abilities and development needs
- P5 Ensure objectives and work plans give equality of opportunity to all team members and make sure no team members are excluded from any work-based or non-work-based team activities because of their culture, age, gender or background
- P6 Explain the objectives and work plans in sufficient detail and at a level and pace appropriate to your individual team members, ensuring the required documentation for the organisation and the individual is completed
- P7 Confirm team and individual understanding of, and commitment to, objectives and work plans at appropriate intervals
- P8 Provide advice and guidance on how to achieve objectives in sufficient detail and at times appropriate to the needs of teams and individuals
- P9 Evaluate objectives and work plans regularly and take account of any individual, team and organisational changes

#### Assess the performance of teams and individuals

*You must be able to:*

- P10 Clearly explain the purpose of monitoring and assessment to all those involved
- P11 Give opportunities to teams and individuals to monitor and assess their own performance against objectives and work plans
- P12 Carry out your assessments objectively, against clear, agreed criteria, and at agreed and appropriate times
- P13 Ensure your assessments take due account of the personal circumstances of team members and the organisational constraints on their work

#### Provide feedback to teams and individuals on their performance

*You must be able to:*

- P14 Provide detailed feedback and action plans for teams and individuals, with constructive suggestions and encouragement for improving future performance against work and development objectives

## **PPL 4GEN8(SQA Unit Code-H2Y7 04)**

### **Manage the performance of teams and individuals**

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- P15 Provide feedback in a way which demonstrates respect for individuals, their circumstances and background, and the need for confidentiality
- P16 Give opportunities to teams and individuals to respond to feedback, and for them to suggest how they could improve their performance in the future
- P17 Manage both poor performance and performance above expectations, in line with organisational performance management guidelines, and in a manner appropriate to the team or individual

# PPL 4GEN8(SQA Unit Code-H2Y7 04)

## Manage the performance of teams and individuals

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### Knowledge and understanding

*You need to know and understand:*

#### Agree objectives and work plans with teams and individuals

- K1 The laws, regulations and company guidelines that dictate how you are expected to behave with colleagues from different backgrounds, how to apply them in relation to your work and where to get further information and advice about them
- K2 The importance of clear communication when explaining objectives and work plans
- K3 The importance of consulting with team members and achieving consensus and agreement on objectives and work plans
- K4 How to encourage and enable team members, to input into and commit to their own work objectives and plans
- K5 The types of issues on which your team members may need advice and guidance
- K6 The organisational objectives and constraints which have a bearing on objectives and work plans
- K7 How to identify and devise objectives and work plans for the short, medium and long term which are realistic and achievable
- K8 Why it is important that the correct documentation required by the organisation is completed, and copies retained by all stakeholders
- K9 How to match objectives and work plans with individuals' abilities and development needs
- K10 The importance of regularly updating objectives and work plans
- K11 The difference between managing those within your line management control and staff from other areas
- K12 The implications for work planning, of managing staff from other areas

#### Assess the performance of teams and individuals

*You need to know and understand:*

- K13 The importance of being clear about the purpose of monitoring and assessment, and communicating this effectively to those involved
- K14 The importance of monitoring and assessing the ongoing performance of teams and individuals, and why different purposes of work monitoring and assessment may be suitable in different cases
- K15 How to make fair and objective assessments, ensuring that colleagues' culture and background are taken into account
- K16 How to monitor and assess the performance of teams and individuals to agreed standards
- K17 The information needed to assess the performance of teams and individuals, and how to gather and validate this
- K18 The importance of providing opportunities to team members to monitor and assess their own work, and how to enable this

## PPL 4GEN8(SQA Unit Code-H2Y7 04)

### Manage the performance of teams and individuals

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- K19 The organisational constraints which may affect the achievement of objectives
- K20 The types of personal circumstances, including those relating to culture, age, gender, health or background, which may impact on individual performance

#### **Provide feedback to teams and individuals on their performance**

*You need to know and understand:*

- K21 The importance of good communication skills when providing feedback
- K22 How to provide both positive and negative feedback to team members on their performance
- K23 How to choose an appropriate time and a place to give feedback to teams and individuals
- K24 How to provide feedback in a way which encourages your team members to feel that you respect them, and have taken account of their personal circumstances and background
- K25 The importance of providing clear and accurate feedback to your team members on their performance and your role and responsibilities in relation to this
- K26 The principles of confidentiality when providing feedback - which people should receive which pieces of information
- K27 How to motivate team members and gain their commitment by providing feedback
- K28 The importance of being encouraging when providing feedback to team members and showing respect for those involved
- K29 The importance of providing constructive suggestions on how performance can be improved
- K30 The importance of giving those involved the opportunity to provide suggestions on how to improve their work



## PPL 4GEN8(SQA Unit Code-H2Y7 04)

Manage the performance of teams and individuals

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**Key words** Manage; performance; objectives; targets; assess; feedback; communicate; motivate

## PPL 4GEN9(SQA Unit Code-H2Y08 04)

### Contribute to the strategic goals of the organisation's leadership team



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#### Overview

This standard is about ensuring you contribute fully as part of the leadership and management team in your hospitality organisation.

To complete this standard, you will be a manager with responsibility for your team and area of the organisation.

You will have to attend and contribute effectively in management meetings, agree operational targets and plans in line with organisational objectives, and be able to respond effectively and innovatively to situations that threaten the achievement of these targets.

## PPL 4GEN9(SQA Unit code-H2Y8 04)

### Contribute to the strategic goals of the organisation's leadership team

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#### Performance criteria

#### Participate in leadership team meetings

*You must be able to:*

- P1 Prepare effectively for scheduled team meetings by ensuring you are aware of and comfortable in dealing with all potential agenda items
- P2 Contribute effectively to discussion in leadership team meetings
- P3 Articulate opinions and issues clearly and concisely, and ensure that possible steps for resolution are discussed
- P4 Acknowledge and constructively discuss information and opinions provided by management colleagues
- P5 Clarify decisions taken on the various agenda items, where necessary
- P6 Communicate decisions clearly and concisely and in a timely way to those who have an interest in the various agenda items, in line with any communication protocol agreed at the meeting
- P7 Produce financial performance reports and forecasts for your area of responsibility, as and when required for leadership team analysis

#### Work interactively with the leadership team on a daily basis

*You must be able to:*

- P8 Work with the leadership team on crisis management issues as necessary
- P9 Work with the leadership team to effectively guide the business through times of organisational change
- P10 Ensure your team's recruitment needs are discussed with and justified to your leadership team colleagues, and factored into organisational recruitment plans and budgets if approved
- P11 Consult with your leadership team colleagues as appropriate when handling conflict in your own team
- P12 Be available to assist your leadership team colleagues as and when they require your help
- P13 Benchmark your team against other teams in the organisation to ensure your team is working to the same standard, and discuss with leadership team colleagues if you notice a disparity that you cannot rectify alone
- P14 Perform the role and responsibilities of duty manager as and when required
- P15 Work with the leadership team to manage large functions or events
- P16 Ensure your team's training and development plans combine cost-effectively with those of your leadership team colleagues, and with organisational objectives
- P17 Seek guidance when appropriate from leadership team colleagues or other colleagues in the organisation
- P18 Contribute effectively to ad-hoc or casual leadership team meetings, as and when issues arise that necessitate these
- P19 Monitor your team's objectives and performance to ensure they align as closely as possible with organisational objectives, as agreed by the leadership team

# PPL 4GEN9(SQA Unit Code-H2Y8 04)

## Contribute to the strategic goals of the organisation's leadership team

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### Knowledge and understanding

*You need to know and understand:*

#### Participate in leadership team meetings

- K1 The importance of briefing yourself on meeting agenda items in advance of the meeting
- K2 How to identify relevant information from your area of responsibility for the meeting
- K3 The importance of consulting those in your hospitality team who have an interest in the various agenda items, and how to do so in order to understand and be able to represent their opinions
- K4 The importance of setting your objectives for the meeting, and how to do so
- K5 The importance of presenting relevant information and opinions to the meeting clearly and concisely, and how to do so
- K6 How to present your opinions and the interests of those you are representing in a convincing way
- K7 The importance of identifying and articulating any issues and problems emerging from discussions, and how to contribute to resolving them
- K8 The importance of acknowledging information and opinions provided by other people, and how to discuss these constructively
- K9 The importance of clarifying decisions taken on various agenda items, where necessary, and how to do so
- K10 The importance of communicating decisions clearly and in a timely way to those who have an interest in the various agenda items, and how to do so in line with any communication protocol agreed at the meeting

#### Work interactively with the leadership team on a daily basis

*You need to know and understand:*

- K11 When crisis management issues will require you to suspend your normal duties and work with the leadership team to achieve resolution
- K12 Your responsibilities at times of organisational change
- K13 What your team's recruitment needs are, and how these are best aligned with wider recruitment budgets and plans
- K14 How the experiences of leadership team colleagues can assist you in dealing with conflict in your own team
- K15 How to offer assistance to leadership team colleagues in a supportive and non-judgmental manner
- K16 How to benchmark your team's performance internally, and what you can do to rectify any discrepancies as a result
- K17 The role and responsibilities of the duty manager in your organisation, and what assistance you may require when asked to perform this role
- K18 Your organisation's procedures for managing large functions or events
- K19 How to align your team's training and development activities with

## PPL 4GEN9(SQA Unit Code-H2Y8 04)

### Contribute to the strategic goals of the organisation's leadership team

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- those from other teams, in a way that supports organisational objectives
- K20 When you might need to seek guidance from leadership team colleagues or other colleagues in the organisation, and how to do this
  - K21 How to make an effective contribution in leadership team meetings called at short notice, ensuring your team's priorities are taken into account
  - K22 How to align your team's objectives with organisational objectives, cascading these appropriately through the team structure

# PPL 4GEN9(SQA Unit Code-H2Y8 04)

Contribute to the strategic goals of the organisation's leadership team

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## Scope/range

### 1 Discussions

- 1.1 own area of responsibility
- 1.2 shared areas of responsibility

## PPL 4GEN9(SQA Unit Code-H2Y8 04)

Contribute to the strategic goals of the organisation's leadership team

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<b>Developed by</b>	People 1st
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<b>Originating organisation</b>	People 1st
<b>Original URN</b>	PPL 4GEN9
<b>Relevant occupations</b>	All Hospitality Managers; Heads of Department
<b>Suite</b>	Hospitality Management
<b>Key words</b>	Leadership; management; strategic; meetings; objectives; organisation; team

## PPL 4GEN10(SQA Unit Code-H2YG 04)

### Devise and implement training and development plans for your hospitality team



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#### Overview

This standard is about devising and implementing training and development plans for your team members, balancing the developmental needs of the individual with the skills and knowledge needed by them to fulfil their role within the organisation.

Within many hospitality organisations, particularly those that are small, there may be little human resources support, therefore as a team manager you may identify and / or provide relevant training for staff yourself.



## PPL 4GEN10(SQA Unit Code-H2YG 04)

### Devise and implement training and development plans for your hospitality team

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#### Performance criteria

*You must be able to:*

- P1 Ensure you are aware of the provision already in place within your organisation for identifying training needs
- P2 Identify what training currently takes place, and where the training budget is held
- P3 Ensure regulatory training is carried out in line with legal requirements and timescales
- P4 Work with other departments, to ensure wherever training can be delivered generically within the organisation, that this is identified and implemented
- P5 Establish links with training providers, where they are best placed to deliver generic training as required
- P6 Ensure fairness when you are required to determine and allocate any share of the training budget
- P7 Carry out a training needs analysis with individuals and teams, and identify with them the skills or knowledge which need to be developed further
- P8 Ensure that the established training needs of both individuals and teams relate to the needs of the organisation
- P9 Agree with individuals their responsibility for their own personal development
- P10 Identify both short-term and long-term aims
- P11 Investigate the most suitable way for individuals and teams to achieve these aims
- P12 Establish that the course will fulfil the established training needs
- P13 Develop a mechanism to ensure the training takes place in a timely and organised fashion
- P14 Ask attendees for feedback on the training
- P15 Keep records showing what training has been completed
- P16 Monitor, review and evaluate the short and long-term effects of the training and the benefits to the organisation
- P17 Agree further support or training the individual requires

## PPL 4GEN10(SQA Unit Code-H2YG 04)

### Devise and implement training and development plans for your hospitality team

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#### Knowledge and understanding

*You need to know and understand:*

- K1 How the training needs of individuals and teams fit in with the needs of the organisation
- K2 The importance of working with individuals to create a development plan that is achievable, relevant and time/cost effective
- K3 How to carry out training needs analysis
- K4 The advantages of using external training providers to deliver certain types of training
- K5 How to identify appropriate training, and what learning outcomes are achieved via different types of training
- K6 The need to gain feedback from the individual on the training, and to evaluate the effectiveness of the training
- K7 Why it is important to look at long-term goals as well as the short-term benefits

## **PPL 4GEN10(SQA Unit code-H2YG 04)**

Devise and implement training and development plans for your hospitality team

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### **Scope/range**

#### **1 Training Needs**

- 1.1 individual's
- 1.2 team's
- 1.3 organisation's

#### **2 Aims**

- 2.1 to meet organisational objectives
- 2.2 to meet individual aspirations

## **PPL 4GEN10(SQA Unit Code-H2YG 04)**

Devise and implement training and development plans for your hospitality team

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**Developed by** People 1st

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**Relevant occupations** All Hospitality Managers; Heads of Departments

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**Suite** Hospitality Management

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**Key words** Training; development; feedback; hospitality; team; objectives; analysis

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## PPL 4GEN11(SQA Unit Code-H2YH 04)

### Manage the use of the organisation's systems to meet operational needs



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#### Overview

This standard is aimed at managers in hospitality who need to understand and use effectively a variety of management information systems in their role. These are likely to be computerised, although other types of systems may be in use, and may complement the computerised systems.

You will also manage your team's use of such systems, ensuring training takes place which promotes efficient and secure working methods.

## PPL 4GEN11(SQA Unit Code-H2YH 04)

### Manage the use of the organisation's systems to meet operational needs

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#### Performance criteria

*You must be able to:*

- P1 Identify the most appropriate operating system for your needs
- P2 Use organisation's operating systems in a methodical, effective and efficient manner, obtaining relevant training where necessary
- P3 Ensure all confidential information is accessible only to authorised colleagues
- P4 Manage the recording and storage of data on systems which are essential to comply with regulatory requirements
- P5 Use systems to procure relevant management information, in a way that helps you analyse performance
- P6 Manage the use of systems which help the effective planning of the workforce
- P7 Use systems effectively which assist the production of reports
- P8 Ensure training takes place when a system has been updated or functionality changes
- P9 Deal with basic system faults
- P10 Ensure serious system faults that you cannot rectify, are referred immediately to a suitable person, and relevant stakeholders are informed of issues and their potential impact
- P11 Evaluate existing operating systems and recommend appropriate changes or improvements to the organisation's systems to the relevant people

## PPL 4GEN11(SQA Unit Code-H2YH 04)

### Manage the use of the organisation's systems to meet operational needs

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#### Knowledge and understanding

*You need to know and understand:*

- K1 Relevant legislation regarding the use of confidential information
- K2 The range of operating systems commonly used by managers in the hospitality industry
- K3 Why it is important to be thoroughly trained before using an organisational operational system
- K4 How to use systems in a logical and methodical way which makes best use of time
- K5 Which areas of your organisation's operating systems have restricted access, and why this is important in each case
- K6 Which records must be kept up-to-date to comply with regulatory requirements, and how to do this using the appropriate operating system
- K7 The ways in which you can use management information derived from operating systems to help analyse performance
- K8 The most appropriate available system for workforce planning
- K9 How to produce reports with your organisation's operating systems
- K10 Why it is important your team is re-trained when operating systems undergo updates or changes in functionality
- K11 How to deal with basic system faults
- K12 The limits of your ability and permissions to deal with system faults, and how and to whom you should refer them
- K13 The latest developments relating to operating systems in the hospitality industry
- K14 When you can realistically effect changes or improvements to operating systems, and who you need to notify before doing so

# PPL 4GEN11(SQA Unit Code-H2YH 04)

Manage the use of the organisation's systems to meet operational needs

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## Scope/range

### 1 Performance

- 1.1 personnel-related (attendance, recruitment – i.e. HR issues)
- 1.2 financial performance
- 1.3 supplier performance
- 1.4 operational performance (customer feedback etc.)
- 1.5 resource management performance
- 1.6 organisational performance
- 1.7 regulatory performance (kitchen temperature checks, fire equipment checks, COSHH checks)



## **PPL 4GEN11(SQA Unit Code-H2YH 04)**

Manage the use of the organisation's systems to meet operational needs

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**Originating organisation** People 1st

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Operating systems; records; database; system; analysis; workforce; hospitality

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## PPL 4GEN12(SQA Unit Code-H2YJ 04)

Determine market opportunities and plan the future provision of services



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### Overview

This standard is about the strategic planning needed when ascertaining what services your hospitality organisation should be offering, and where the greatest opportunities exist for the future success of the business.

You are likely to be a departmental or other senior manager within a hospitality organisation, with strategic input to organisation-level decisions.

## PPL 4GEN12(SQA Unit Code-H2YJ 04)

### Determine market opportunities and plan the future provision of services

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#### Performance criteria

*You must be able to:*

- P1 Obtain qualitative feedback on your organisation's offering of services through observation and team discussion
- P2 Obtain structured quantitative customer feedback on your current offering of services
- P3 Identify areas where your current offering of services could be improved and / or streamlined to improve profitability and / or quality
- P4 Conduct market analysis which assesses the provision of services in the wider hospitality market in a way which complements your planning
- P5 Build competitor profiles which highlight their strengths, weaknesses, opportunities and threats (S.W.O.T. analysis)
- P6 Analyse both qualitative and quantitative feedback to identify your organisation's strengths, weaknesses, opportunities and threats
- P7 Balance the weight of strengths and weaknesses, opportunities and threats, to give a realistic assessment of market opportunities
- P8 Identify gaps in the provision of hospitality services in your local area, from which your organisation could profit
- P9 Identify commercial opportunities which align to organisational strategic objectives and brand image
- P10 Ensure any identified opportunities meet the needs of your organisation's target market
- P11 Ensure your organisation is adequately resourced to be able to provide an identified new or modified service
- P12 Prioritise opportunities, taking into account ease of implementation, return on investment (ROI), and alignment with the overall service offering
- P13 Calculate the ROI of any potential new or modified service
- P14 Contribute to the decision-making process for the provision of new or modified services
- P15 Define success factors for any new service the organisation decides to provide, that fall within your area of responsibility
- P16 Create a project plan for the launch of a new or modified service, including all resources needed to ensure a successful launch

## PPL 4GEN12(SQA Unit Code-H2YJ 04)

### Determine market opportunities and plan the future provision of services

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#### Knowledge and understanding

*You need to know and understand:*

- K1 The difference between qualitative and quantitative feedback, and the benefits of each
- K2 How to obtain structured quantitative customer feedback on your current offering of services
- K3 Your organisation's offering of services, and the relative profitability and customer satisfaction levels in relation to each
- K4 How to obtain detailed market research analysis for the hospitality sector
- K5 Who your organisation's chief competitors are
- K6 The benefits of S.W.O.T. analysis and how to conduct it
- K7 How to weight the relative importance of strengths, weaknesses, opportunities and threats
- K8 The availability of hospitality services in your local area
- K9 Your organisation's brand image
- K10 Your organisation's strategic objectives
- K11 Your organisation's target market
- K12 The availability of resources which may impact the provision of a new or modified service
- K13 How to calculate return on investment (ROI)
- K14 How to contribute effectively to the organisational decision-making process
- K15 The factors that will define success for any new or modified service
- K16 The limits of your own authority and responsibility in relation to the planning and management of services
- K17 How to design a project plan which takes account of all necessary resources and deadlines

# PPL 4GEN12(SQA Unit Code-H2YJ 04)

Determine market opportunities and plan the future provision of services

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## Scope/range

### 1 Team

- 1.1 your departmental team
- 1.2 the organisational leadership team

### 2 Hospitality services

- 2.1 vehicle services
- 2.2 gym / leisure facilities
- 2.3 ticket booking
- 2.4 dining options
- 2.5 room service
- 2.6 accommodation options
- 2.7 banqueting & events services
- 2.8 bar services

### 3 Resources

- 3.1 staff
- 3.2 budget

## PPL 4GEN12(SQA Unit Code-H2YJ 04)

Determine market opportunities and plan the future provision of services

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<b>Relevant occupations</b>	All Managers in Hospitality; Heads of Department
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<b>Suite</b>	Hospitality Management
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<b>Key words</b>	Hospitality; marketing; services; opportunities; resources; return on investment
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### Overview

This standard is suitable for all managers in hospitality. One of the most important elements of the role is to ensure that the team make the most of sales opportunities, and when doing so, maximise profit margins, without affecting the customer's experience. As their manager, your job is to ensure they are trained and able to do this effectively.

# PPL 4GEN13(SQA Unit Code-H2YK 04)

## Maximise sales and profit

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### Performance criteria

*You must be able to:*

- P1 Consult with management colleagues to ensure that the data used to inform decision-making is accurate and up-to-date
- P2 Proactively identify opportunities to maximise sales and profit, taking account of known competitor activity, trends and customer behaviour
- P3 Determine actions to be taken to maximise sales and profit and agree them with the organisational leadership team
- P4 Use your position with suppliers as leverage to maximise your buying power and reduce purchasing costs
- P5 Develop a culture of waste minimisation and energy saving in a way that will reduce costs and increase profits
- P6 Identify high-performing products, and respond with suitable strategies which will maximise their profit potential
- P7 Identify risks arising from actions to maximise profit, and establish contingency plans to manage any consequences
- P8 Advise suppliers or colleagues promptly and clearly about any actions you need them to take
- P9 Ensure your team are trained to recognise and take advantage of opportunities to upsell and maximise profits
- P10 Meet and, where possible, exceed your profit targets
- P11 Monitor and evaluate the effect of actions taken to maximise sales and profits, and use this information to inform future decision-making



# PPL 4GEN13(SQA Unit Code-H2YK 04)

## Maximise sales and profit

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### Knowledge and understanding

*You need to know and understand:*

- K1 Why it is critical to success to ensure that the data used to inform decision-making is accurate and up-to-date
- K2 How to analyse complex information and identify opportunities to maximise sales and profit, taking account of known competitor activity and customer behaviour
- K3 What information to take into account including: costs, sales volumes, market conditions and demand, targets for sales and return on investment, possible responses to competitor behaviour and changing market conditions and the relative merits of these
- K4 How to run a break-even analysis and other scenario explorations
- K5 Processes to be followed to agree actions with the your leadership team colleagues in your organisation
- K6 How to take advantage of your position with suppliers to obtain the best possible deal for your organisation
- K7 Company policies and consumer law related to product pricing strategies
- K8 Strategies to minimise waste and excess energy usage, and how these can contribute to profit margins
- K9 How to ensure your team are trained to recognise and take advantage of opportunities to upsell and maximise profits
- K10 Strategies which will maximise the sale of high-performing products
- K11 The importance of protecting return on investment and how to conduct a risk analysis
- K12 Your profit targets as a team, and any strategic planning needed to meet them
- K13 Why it is important to ensure that any actions needed by suppliers or others within the company are reported to them promptly and clearly
- K14 Why it is important to monitor and evaluate the impact of actions taken to maximise sales and profits and use this to inform future decision-making

## PPL 4GEN13(SQA Unit Code-H2YK 04)

### Maximise sales and profit

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#### Glossary

#### **Waste minimisation and energy saving**

This can include recycling where possible, eliminating excess packaging, avoiding unnecessary energy usage and commodity controls

# PPL 4GEN13(SQA Unit Code-H2YK 04)

Maximise sales and profit

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**Relevant occupations** All Hospitality Managers; Heads of Department

---

**Suite** Hospitality Management

---

**Key words** Sales; revenue; profit; customer; analysis

# PPL 4GEN14(SQA Unit Code-H2YM 04)

## Manage operational aspects of refurbishment programmes



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### Overview

This standard is for managers in hospitality who have some operational management responsibility for refurbishment programmes undertaken by the organisation. You may not be responsible for décor or construction decisions, but you will have the responsibility of implementing those decisions.

## PPL 4GEN14(SQA Unit Code-H2YM 04)

### Manage operational aspects of refurbishment programmes

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#### Performance criteria

- You must be able to:*
- P1 Contribute to leadership team discussions on refurbishment
  - P2 Identify areas of the establishment both within and outside your area of responsibility which are in need of general refurbishment
  - P3 Calculate a budget for the refurbishment of your area of responsibility
  - P4 Contribute to design plans where you have the autonomy to do so
  - P5 Liaise with colleagues to ensure the plan for refurbishment work in your area of responsibility minimises disruption to guests, without compromising on the quality and speed of completion
  - P6 Obtain quotes for the refurbishment work agreed where you have the autonomy to do so
  - P7 Agree dates and locations for the planned refurbishment in a way that minimises disruption to business activity
  - P8 Ensure all potentially affected staff are aware of the planned refurbishment, and work in a way which minimises disruption to guests, colleagues or contractors
  - P9 Check that refurbishment work takes account of relevant legislation
  - P10 Ensure security procedures are in place to allow external contractors to work without having access to private or secure areas
  - P11 Monitor the timeliness and adherence to plans of refurbishment work in your area of responsibility
  - P12 Deal with any problems relating to refurbishment work in a way which minimises disruption to guests and your team's work activities
  - P13 Resolve any issues which are preventing refurbishment workers from meeting their targets
  - P14 Check completed refurbishment work for quality and adherence to the initial plans
  - P15 Evaluate the success of the refurbishment project
  - P16 Feed back to the leadership team your evaluation, with suggestions for potential improvements to the way refurbishment programmes are managed

# PPL 4GEN14(SQA Unit Code-H2YM 04)

## Manage operational aspects of refurbishment programmes

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### Knowledge and understanding

*You need to know and understand:*

- K1 Quality and condition points which may indicate the need for large-scale refurbishment
- K2 The limits of your autonomy to decide on design and budget of refurbishment programmes
- K3 The various elements that need to be factored into a refurbishment budget
- K4 How to design refurbishment plans that meet organisational standards and customer expectations
- K5 Levels of business activity which help to decide the best time to undertake a refurbishment programme
- K6 How refurbishment work can be organised to minimise disruption to guests
- K7 How to obtain reasonable quotes for refurbishment work within the limits of your responsibility to do so
- K8 The normal costs for refurbishment work of the standard your organisation expects
- K9 Relevant legislation that governs safe working practices for refurbishment work
- K10 Which areas of the establishment are off-limits to external contractors, and how to ensure the security of these areas
- K11 How to keep refurbishment programmes to the planned timescales
- K12 How to deal with any problems relating to refurbishment work promptly, minimising disruption to both guests and colleagues
- K13 What checks need to be made to assess the satisfactory completion of refurbishment work
- K14 How to evaluate the success of the refurbishment project
- K15 Which areas of the refurbishment programme could potentially be improved in future, and how to communicate this to the relevant people

## **PPL 4GEN14(SQA Unit Code-H2YM 04)**

### Manage operational aspects of refurbishment programmes

---

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Manage; refurbishment; décor; design; project; programme

# PPL 4GEN15(SQA Unit Code-H2YN 04)

## Initiate and manage supplier contracts



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### Overview

This standard is about researching, sourcing, negotiating, agreeing and managing contracts with the suppliers to your hospitality business.

This includes the effective monitoring of supplier contracts and costs.



## PPL 4GEN15(SQA Unit Code-H2YN 04)

### Initiate and manage supplier contracts

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#### Performance criteria

*You must be able to:*

- P1 Identify the resources that you need to purchase, in order to satisfy operational requirements
- P2 Establish your purchasing budget for each resource requirement
- P3 Research potential suppliers for each resource requirement, where you have autonomy to do so
- P4 Promote invitation to tender to a range of potential contractors or suppliers, if necessary
- P5 Evaluate tenders against your established criteria, selecting the supplier or contractor who best meets your needs within budgetary constraints
- P6 Negotiate contracts that maximise the potential for profit, within the limits of your own authority, whilst adhering to your organisation's quality criteria
- P7 Ensure groups of resources are supplied together, where this is the most cost-effective way of doing so
- P8 Ensure contracts with suppliers and contractors are consistent in style, and meet both legal requirements and organisational standards
- P9 Establish service level agreements that are clear and acceptable to both your organisation and suppliers/contractors
- P10 Keep the amount of supplier and contractor relationships to a manageable number
- P11 Monitor compliance with the contract, taking into account legal, regulatory and your own organisational requirements
- P12 Deal with breaches of contract within acceptable timescales, negotiating refunds or credit for your organisation where appropriate
- P13 Deal effectively with supplier disputes
- P14 Evaluate the success of contractual arrangements on a regular basis
- P15 Re-negotiate contract terms to the benefit of your organisation, where appropriate and without detriment to the supplier relationship
- P16 Report on your supplier contracts to the senior management team, identifying possible synergies with other areas of the organisation

# PPL 4GEN15(SQA Unit Code-H2YN 04)

## Initiate and manage supplier contracts

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### Knowledge and understanding

*You need to know and understand:*

- K1 The different types of supplier contracts and agreements and when they are appropriate
- K2 The basic legal, regulatory and organisational requirements governing contracts
- K3 The limits of your own authority when dealing with supplier contracts
- K4 Your organisation's preferred suppliers, and your authority to deal with suppliers other than these
- K5 Why it is important to have clear requirements and specifications when establishing supplier contracts
- K6 Any regulatory requirements that contracts with suppliers and/or contractors will need to incorporate
- K7 Why it is important to invite a range of potential suppliers and/or contractors to bid for the contract
- K8 Which points to consider when evaluating tenders
- K9 Why it is important to build productive working relationships with suppliers and/or contractors and how to do so
- K10 Which groups of resources could best be supplied together within one contract
- K11 The different methods of monitoring compliance with a contract and how to select a method appropriate to you, the contractor and the contract
- K12 Why it is important to use service level agreements wherever possible
- K13 How to maintain harmonious relationships with suppliers/contractors, whilst simultaneously achieving the best terms for you organisation
- K14 The different types of information sources and types of information you can use to evaluate contracts
- K15 The limits of your authority when dealing with supplier / contractor disputes, and who to refer disputes to when these limits are reached
- K16 Why it is important to evaluate and report on suppliers' and/or contractors' strengths and areas for improvement
- K17 Other supplier/contractor relationships within the organisation, and how you can use these relationships to your advantage

# PPL 4GEN15(SQA Unit Code-H2YN 04)

## Initiate and manage supplier contracts

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### Scope/range

#### 1 Resources

- 1.1 stock
- 1.2 equipment
- 1.3 services

## PPL 4GEN15(SQA Unit Code-H2YN 04)

### Initiate and manage supplier contracts

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**Originating organisation** People 1st

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**Original URN** PPL 4GEN15

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Initiate; manage; suppliers; contractors; contracts; resources

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### Overview

This standard is about the smooth operation of a function and the planning, operating and evaluation to ensure that it goes to plan.

It is aimed at the Duty Manager or Conference Organiser who will need to show that they are able to plan and review, communicate effectively with the internal or external customer requesting the function, use resources effectively, solve problems, keep accurate documentation, and provide their customer with what they want.

# PPL 4GEN16(SQA Unit Code-H2YP 04)

## Manage a function

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### Performance criteria

*You must be able to:*

#### Plan a function

- P1 Gather all the necessary information about the function, customer requirements and your responsibilities
- P2 Establish procedures to ensure that requirements are met and contingencies are developed
- P3 Make sure that the equipment and materials needed for the function are on site in good time and are available to the staff that will need to use them
- P4 Inspect the function venue to make sure that it has been prepared as agreed
- P5 Familiarise yourself with all the necessary health and safety, licensing and other legal requirements and communicate these clearly to colleagues and customers
- P6 Ensure the team working on the function contains qualified first aid personnel
- P7 Keep accurate records of agreements made, and requirements of suppliers both within and outside the organisation
- P8 Confirm details with the customer and other departments within the organisation
- P9 Provide the customer with full schedules and costings for the function, and update them of any changes throughout

#### Manage a function

*You must be able to:*

- P10 Co-ordinate the different departments contributing to the running of the function
- P11 Ensure food preparation and service is undertaken in a way that accounts for any specified requirements (e.g. vegetarian food, allergenic problems)
- P12 Liaise with the customer throughout the function to make sure that the arrangements meet their requirements
- P13 Monitor the function to make sure that it is running to plan and deal with any problems that threaten to disrupt operations
- P14 Make sure the function and all associated activities comply with relevant legislation and your organisation's standards
- P15 Record information on the running of the function that will assist in future function planning

#### Evaluate the success of a function

*You must be able to:*

- P16 Gather feedback from customers and staff and other colleagues to assess the functions success
- P17 Investigate further where problems are highlighted, or improvements

## PPL 4GEN16 (SQA Unit Code-H2YP 04)

### Manage a function

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could be made

- P18 Distinguish between problems that were unavoidable, and those which were due to systemic or individual faults
- P19 Make recommendations which will avoid repeat issues, and which will improve the functions offered by the organisation
- P20 Record your evaluation of the function in a manner appropriate to the feedback you obtain
- P21 Report on your findings at the appropriate time to the senior management team of your organisation

# PPL 4GEN16(SQA Unit Code-H2YP 04)

## Manage a function

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### Knowledge and understanding

*You need to know and understand:*

#### Plan a function

- K1 Your organisation's customer care policy
- K2 How and why it is important to assess the impact that the function is likely to have on customers, residents or local businesses, and actions that can be taken to minimise disturbance
- K3 How to calculate function schedules and costings
- K4 The variety of information required to plan different types of functions and where to find this, including: customers' specific requirements, staffing, equipment, budget, venue capacity and other specifications
- K5 How to deal with special requirements for different client groups including: children, older people and people with disabilities
- K6 The types of specific requirements your customers may have, for example, for food, drinks, promotional or seating arrangements
- K7 How to ensure appropriate appointment of contractors/suppliers and how to manage the types of contractors likely to be employed in your area of responsibility
- K8 How to ensure that staff (including contractors) have the required skills, knowledge and resources to carry out their responsibilities
- K9 Factors that need to be considered in arranging food and beverages for the function
- K10 Food safety measures that need to be employed for different types of functions, arrangements and environments
- K11 How to manage the available resources for events
- K12 How to inspect the venue to ensure preparations are going smoothly
- K13 How to carry out a risk assessment of the premises and what to do with the information

#### Manage a function

*You need to know and understand:*

- K14 How to ensure effective management of staff for the event including allocation of responsibilities, briefing and supervision
- K15 Factors that can influence the ambience of functions
- K16 Why it is important to anticipate problems, the types of problems that may occur during functions and how you should deal with these
- K17 Health and safety and other legal requirements that can affect the running of a function, and which of these need to be communicated to customers
- K18 How to evacuate the premises effectively and safely in the event of an emergency
- K19 The importance of having qualified first aiders in your team
- K20 How to monitor the function and who you should liaise with during the function to make sure things are going as planned



# PPL 4GEN16(SQA Unit Code-H2YP 04)

## Manage a function

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- K21 How to carry out an inspection of equipment used during functions
- K22 The types of records that should be maintained for functions and your organisation's procedures in relation to this
- K23 How information about the function should be communicated to customers
- K24 Why it is important to communicate with the organiser of the function and how you should do this
- K25 Who is responsible for storing equipment and reporting loss or damage
- K26 How to respond to requests or complaints

### **Evaluate the success of a function**

*You need to know and understand:*

- K27 The types of problems that may occur when a function has finished, and how to identify and report these
- K28 The difference between one-off unavoidable problems, and problems (either systemic or individual) that can be addressed to avoid repetition
- K29 How to address systemic issues in a way that benefits the organisation and any individuals concerned
- K30 A variety of evaluation methods, and which are appropriate to each size and type of function
- K31 How to present your evaluation clearly and concisely to relevant stakeholders
- K32 Which information may be of a private or confidential nature when putting together an evaluation report

# PPL 4GEN16(SQA Unit Code-H2YP 04)

## Manage a function

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### Scope/range

- 1 Function**
  - 1.1 banquet
  - 1.2 corporate entertainment event
  - 1.3 reception
  - 1.4 conference
  
- 2 Problems**
  - 2.1 supply problems
  - 2.2 power failures
  - 2.3 equipment problems
  - 2.4 staffing problems
  
- 3 Customer**
  - 3.1 internal
  - 3.2 external
  
- 4 Records**
  - 4.1 manual
  - 4.2 computerised
  - 4.3 reports
  - 4.4 checklists
  
- 5 Legislation**
  - 5.1 health and safety
  - 5.2 fire regulations
  - 5.3 licensing restrictions
  - 5.4 food safety
  - 5.5 first aid

# PPL 4GEN16(SQA Unit Code-H2YP 04)

## Manage a function

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**Developed by** People 1st

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**Status** Original

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**Originating organisation** People 1st

---

**Original URN** PPL 4GEN16

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Manage; functions; banquets; conferences; events

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### Overview

This standard covers the legislative and regulatory requirements that can commonly be expected to govern hospitality management operations.

Managers in hospitality will be expected to ensure they and their teams comply with these requirements, that they are able to report on this compliance, and deal with external people, such as inspection staff, as and when required.

# PPL 4GEN17(SQA Unit Code-H2Y9 04)

## Comply with legislative requirements in hospitality

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### Performance criteria

- You must be able to:*
- P1 Keep up-to-date with the regulatory and legislative requirements relating to your area of responsibility
  - P2 Monitor professional and/or trade media for new developments relating to regulatory and legislative requirements
  - P3 Review the regulatory and legislative requirements relating to your area of responsibility with the management team as necessary
  - P4 Develop effective policies and procedures to ensure your team meets all regulatory and legislative requirements
  - P5 Manage the delivery of all regulatory and compliance training, including refresher training where required
  - P6 Ensure the whole team understands all relevant regulatory and legislative requirements before allowing them to work in the relevant areas
  - P7 Maintain accurate and regular records, as required by the guidelines for due diligence contained in all relevant legislation and regulations
  - P8 Take responsibility for the team's compliance with regulatory and legislative requirements
  - P9 Manage preparations for inspection or visits from compliance officers
  - P10 Ensure your area of responsibility meets all requirements of inspection or compliance visits
  - P11 Deal with any issues raised by inspection or compliance visits, and report on any shortcomings or lack of compliance to the relevant stakeholders
  - P12 Evaluate your team's performance with relation to regulatory and legislative requirements
  - P13 Report to the management team on matters relating to regulatory and legislative requirements, suggesting changes and improvements to practice where practicable

## PPL 4GEN17(SQA Unit Code-H2Y9 04)

### Comply with legislative requirements in hospitality

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#### Knowledge and understanding

*You need to know and understand:*

- K1 The regulatory and legislative requirements relating to your area of responsibility, and why compliance with these is essential
- K2 The impact of non-compliance with regulatory and legislative requirements
- K3 Where to find information on new developments relating to regulatory and legislative requirements
- K4 When to review regulatory and legislative requirements with the management team
- K5 How to ensure regulatory and compliance training is delivered, and how to schedule this training as required
- K6 How to check the team's understanding of relevant regulatory and legislative requirements
- K7 Which records are required to be maintained by legislation and/or regulations
- K8 Why the team's compliance with regulatory and legislative requirements is ultimately your responsibility, and the consequences of not conveying this message
- K9 What needs to be done prior to inspection or visits from compliance officers
- K10 The criteria by which inspection or compliance visits will take place
- K11 How to deal with any issues raised by inspection or compliance visits, in a way which creates learning points and ensures future compliance
- K12 How to evaluate the team's performance with relation to regulatory and legislative requirements
- K13 How to produce reports on regulatory and legislative requirements, incorporating suggestions for changes and improvements, in a way that management colleagues will understand

# PPL 4GEN17(SQA Unit Code-H2Y9 04)

## Comply with legislative requirements in hospitality

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### Scope/range

#### 1 Regulatory and legislative requirements

- 1.1 licensing (including weights and measures, and licensing objectives relevant to the country you operate in)
- 1.2 health and safety (e.g. COSHH, HACCP, risk assessments, Health & Safety at Work Act)
- 1.3 food safety
- 1.4 environmental health
- 1.5 fire regulations
- 1.6 data Protection
- 1.7 trades descriptions
- 1.8 human resources (e.g. permission to work, working time regulations, night-time working, absence management)

## PPL 4GEN17(SQA Unit Code-H2Y9 04)

### Comply with legislative requirements in hospitality

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**Developed by** People 1st

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**Version number** 1

---

**Date approved** October 2011

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**Validity** Current

---

**Status** Original

---

**Originating organisation** People 1st

---

**Original URN** PPL 4GEN17

---

**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Hospitality; legislation; compliance; regulation; licensing; health; safety; fire regulations; records; reports; training



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### Overview

This standard is about ensuring the availability of the physical resources (equipment, materials, premises, services and energy supplies) required to carry out planned activities in your area of responsibility. It involves identifying the resources required, making the business case to obtain these resources, planning how they will be used effectively, efficiently, sustainably, safely and securely, monitoring resource use and taking corrective action, if required.

This standard is imported from the Leadership and Management 2009 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN18(SQA Unit Code-FM5F 04)

## Manage physical resources

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### Performance criteria

*You must be able to:*

- P1 Invite those who use resources to contribute to identifying the resources required and planning and monitoring their use
- P2 Evaluate past patterns of resource use and trends and developments likely to affect future demand for resources
- P3 Identify the range and quantity of resources required for the planned activities in your area of responsibility including likely contingencies
- P4 Identify sustainable resources and ensure their effectiveness and efficiency
- P5 Make the business case for the resources required, clearly showing the costs involved and the expected benefits
- P6 Agree appropriate adjustments to your planned activities, where the required resources cannot be obtained in full
- P7 Ensure contracts, service level agreements or other arrangements with suppliers, allow for resources to be available when required, including contingency scenarios
- P8 Plan to use resources in ways that are efficient and minimise any adverse impact on the environment
- P9 Take appropriate action to ensure the security of resources and that they are used safely
- P10 Ensure regular audits of resources are carried out, covering both quantity and condition, and analyse these to establish patterns of resource use
- P11 Take timely corrective action to deal with any significant discrepancies between actual and planned resource use

# PPL 4GEN18(SQA Unit Code-FM5F 04)

## Manage physical resources

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### Knowledge and understanding

*You need to know and understand:*

- K1 Why it is important to involve senior members of your team in identifying levels of resource usage, and how to do so
- K2 How to access information on patterns of past resource use within your organisation, and use these to inform your resourcing plans
- K3 How to access information on trends and developments in the hospitality industry that may affect resource planning
- K4 How to identify the range and calculate the quantity of resources required to carry out planned activities
- K5 Actual and potential suppliers of hospitality resources you may need, prioritising any preferred supplier list that exists
- K6 The importance of using sustainable resources and how to identify such resources and ensure their effectiveness and efficiency
- K7 How to carry out a cost-benefit analysis and make a business case for presentation to senior management colleagues
- K8 How you can get support in making alternative arrangements, if required resources cannot be obtained in full
- K9 How to make flexible arrangements with suppliers to ensure resources are available as and when required
- K10 The potential impact of hospitality resource use on the environment and actions you can take to minimise any adverse impact
- K11 Organisational and legislative requirements for the audit of resources, and how to monitor the accurate completion of audits
- K12 Risks associated with hospitality resources, and actions you can take to ensure resources are kept secure and used safely
- K13 The types of corrective actions (e.g. changing planned activities, changing the ways in which resources are used for activities, re-negotiating the availability of resources, investigation of anomalous audit results) you can take in case of significant discrepancies between actual and planned resource use
- K14 Current issues relating to the supply of hospitality resources

# PPL 4GEN18(SQA Unit Code-FM5F 04)

## Manage physical resources

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### Scope/range

#### 1 Resources

- 1.1 stock
- 1.2 equipment

# PPL 4GEN18(SQA Unit Code-FM5F 04)

## Manage physical resources

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### Behaviours

- 1 You recognise changes in circumstances promptly and adjust plans and activities accordingly
- 2 You prioritise objectives and plan work to make the best use of time and resources
- 3 You accurately calculate risks, and make provision so that unexpected events do not impede the achievement of objectives
- 4 You monitor the quality of work and progress against plans and take appropriate corrective action, where necessary
- 5 You make best use of existing sources of information
- 6 You identify clearly the value and benefits to people of a proposed course of action
- 7 You present ideas and arguments convincingly and in ways that strike a chord with people
- 8 You identify the range of elements in a situation and how they relate to each other
- 9 You identify the implications or consequences of a situation
- 10 You take timely decisions that are realistic for the situation

### Glossary

#### **Sustainable resources**

Resources that can be extensively re-used or re-cycled; non-disposable items; locally sourced resources with a low carbon footprint

#### **Organisational and legislative requirements for the audit of resources**

Such as regular stock-takes, COSHH audits, fire equipment tests, PAT testing, risk assessments

# PPL 4GEN18(SQA Unit Code-FM5F 04)

## Manage physical resources

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**Developed by** People 1st

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**Date approved** October 2011

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**Status** Tailored

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**Originating organisation** CfA Business Skills @ Work

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**Original URN** M&L E8

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Hospitality; stock; resources; audit; budget; suppliers

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### Overview

This standard is about putting into practice the strategy and associated plans for a specific change or programme of change. This involves putting in place the necessary resources and supporting systems, including monitoring and communications, to turn the 'vision' into a practical reality.

This standard is imported from the Leadership and Management 2009 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN19(SQA Unit Code-FM4X 04)

## Implement change

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### Performance criteria

*You must be able to:*

- P1 Put into practice the strategies and plans for change in line with the available resources
- P2 Design new work processes, procedures, systems, structures and roles to achieve the vision behind the change
- P3 Identify, assess and deal with problems and barriers to change
- P4 Monitor, document and communicate progress to all involved
- P5 Recognise and reward people and teams who achieve results
- P6 Maintain the momentum for change
- P7 Make sure change is effective and meets the requirements of the organisation



# PPL 4GEN19(SQA Unit Code-FM4X 04)

## Implement change

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### Knowledge and understanding

*You need to know and understand:*

#### General knowledge and understanding

- K1 The main models and methods for managing change effectively, and their strengths and weaknesses
- K2 Theory and application of the change/performance curve
- K3 Theory and understanding of teams, including an understanding of team-building techniques and how to apply them
- K4 How to manage reward systems
- K5 Problem-solving techniques
- K6 The political, bureaucratic and resource barriers to change, and the techniques that deal with these
- K7 How to identify development and other support needs and ways in which these needs can be met
- K8 How to manage expectations during change

#### Industry/sector specific knowledge and understanding

- K9 Your organisation's current position in the market in which it works, compared with its main competitors, relevant to the change programme
- K10 The range of information sources that are relevant to the sector, and related sectors, in which your organisation operates

#### Context specific knowledge and understanding

- K11 Your vision for the future, the reasons for change, the risks and expected benefits
- K12 Business critical activities and interdependencies
- K13 Those factors (for example, strategy, procedures, policies and structure) that need to be changed, and the associated priorities and reasons
- K14 Your organisation's communication channels, both formal and informal

# PPL 4GEN19(SQA Unit Code-FM4X 04)

## Implement change

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### Behaviours

- 1 You recognise changes in circumstances promptly and adjust plans and activities accordingly
- 2 You find practical ways to overcome barriers
- 3 You present information clearly, concisely, accurately and in ways that promote understanding
- 4 You make time available to support others
- 5 You clearly agree what is expected of others and hold them to account
- 6 You recognise when there are conflicts, acknowledge the feelings and views of all parties, and redirect people's energy towards a common goal
- 7 You work towards a clearly defined vision of the future
- 8 You recognise the achievements and the success of others

# PPL 4GEN19(SQA Unit Code-FM4X 04)

## Implement change

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**Developed by** People 1st

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---

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**Status** Imported

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**Originating organisation** CfA Business Skills @ Work

---

**Original URN** M&L C6

---

**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Implement; change; strategy

# PPL 4GEN20(SQA Unit Code-DR67 04)

## Manage your own resources and professional development



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### Overview

This unit is about managing your personal resources (particularly knowledge, understanding, skills, experience and time) and your professional development in order to achieve your work objectives and your career and personal goals.

You need to understand your work role and how it fits into the overall vision and objectives of the organisation whilst also understanding what is driving you in terms of your values and your career and wider personal aspirations. Identifying and addressing gaps in your skills and knowledge and understanding is an essential aspect of this unit.

This standard is imported from the Leadership and Management 2009 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN20(SQA Unit Code-DR67 04)

## Manage your own resources and professional development

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### Performance criteria

*You must be able to:*

- P1 Evaluate, at appropriate intervals, the current and future requirements of your work role taking account of the vision and objectives of your organisation
- P2 Consider your values and your career and personal goals and identify information which is relevant to your work role and professional development
- P3 Discuss and agree personal work objectives with those you report to and how you will measure progress
- P4 Identify the learning styles which work best for you and ensure that you take these into account in identifying and undertaking development activities
- P5 Identify any gaps between the current and future requirements of your work role and your current knowledge, understanding and skills
- P6 Discuss and agree, with those you report to, a development plan to address any identified gaps in your current knowledge, understanding and skills and support your own career and personal goals
- P7 Undertake the activities identified in your development plan and evaluate their contribution to your performance
- P8 Review and update your personal work objectives and development plan in the light of performance, any development activities undertaken and any wider changes
- P9 Get regular and useful feedback on your performance from those who are in a good position to judge it and provide objective and valid feedback
- P10 Ensure that your performance consistently meets or goes beyond agreed requirements

# PPL 4GEN20(SQA Unit Code-DR67 04)

## Manage your own resources and professional development

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### Knowledge and understanding

*You need to know and understand:*

#### General knowledge and understanding

- K1 The principles which underpin professional development
- K2 The importance of considering your values and career and personal goals and how to relate them to your work role and professional development
- K3 How to evaluate the current requirements of a work role and how the requirements may evolve in the future
- K4 How to set work objectives which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)
- K5 How to identify development needs to address any identified gaps between the requirements of your work role and your current knowledge, understanding and skills
- K6 What an effective development plan should contain and the length of time that it should cover
- K7 The range of different learning styles and how to identify the style(s) which work(s) best for you
- K8 The type of development activities that can be undertaken to address identified gaps in your knowledge, understanding and skills
- K9 How to identify whether/how development activities have contributed to your performance
- K10 How to update work objectives and development plans in the light of performance, feedback received, any development activities undertaken and any wider changes
- K11 How to monitor the quality of your work and your progress against requirements and plans
- K12 How to evaluate your performance against the requirements of your work role
- K13 How to identify and use good sources of feedback on your performance

#### Industry/sector specific knowledge and understanding

- K14 Industry/sector requirements for the development or maintenance of knowledge, skills and understanding and continuing professional development

#### Context specific knowledge and understanding

- K15 The requirements of your work role including the limits of your responsibilities
- K16 The vision and objectives of your organisation
- K17 Your own values and career and personal goals
- K18 Your personal work objectives

## **PPL 4GEN20(SQA Unit Code-DR67 04)**

### **Manage your own resources and professional development**

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- K19 Your preferred learning style(s)
- K20 Your current knowledge, understanding and skills
- K21 Identified gaps in your current knowledge, understanding and skills
- K22 Your personal development plan
- K23 Available development opportunities and resources in your organisation
- K24 Your organisation's policy and procedures in terms of personal development
- K25 The reporting lines in your organisation
- K26 Possible sources of feedback in your organisation

# PPL 4GEN20(SQA Unit Code-DR67 04)

## Manage your own resources and professional development

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### Behaviours

- 1 You address multiple demands without losing focus or energy
- 2 You recognise changes in circumstances promptly and adjust plans and activities accordingly
- 3 You prioritise objectives and plan work to make best use of time and resources
- 4 You take personal responsibility for making things happen
- 5 You take pride in delivering high quality work
- 6 You show an awareness of your own values, motivations and emotions
- 7 You agree achievable objectives for yourself and give a consistent and reliable performance
- 8 You recognise your own strengths and limitations, play to your strengths and use alternative strategies to minimise the impact of your limitations
- 9 You make best use of available resources and proactively seek new sources of support when necessary
- 10 You reflect regularly on your own experiences and use these to inform future action



## PPL 4GEN20(SQA Unit Code-DR67 04)

### Manage your own resources and professional development

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**Developed by** People 1st

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---

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**Original URN** M&L A2

---

**Relevant occupations** All Hospitality Managers; Heads of Department

---

**Suite** Hospitality Management

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**Key words** Manage; self; resources; professional; development; learning; goals

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### Overview

This standard is about initiating and following your organisation's grievance procedure in response to a concern, problem or complaint raised by a member of your team.

All employing organisations are required to have disciplinary and grievance procedures. As a minimum, these must meet the requirements laid down in relevant employment legislation. However, many organisations have developed more detailed and extensive grievance procedures to reflect their specific contexts and requirements.

This standard describes the minimum standard of performance expected of managers when they are implementing grievance procedures in line with legal and organisational requirements. To meet this standard, managers need both sound technical knowledge of the procedures and well-developed cognitive and interpersonal skills.

The standard is for line managers who have to deal with potential or actual grievances raised by members of their team. It is **not** designed for human resources specialists who are required to develop grievance procedures and provide specialist support to line managers who are implementing them.

This standard is imported from the Leadership and Management 2009 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN21(SQA Unit Code-FM58 04)

## Initiate and follow grievance procedure

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### Performance criteria

*You must be able to:*

- P1 Keep individuals fully informed about your organisation's current procedure for raising grievances
- P2 Seek support from colleagues or human resources or legal specialists on any aspects of implementing grievance procedures about which you are unsure
- P3 Identify potential grievances and take preventative measures to resolve issues where possible
- P4 If an individual raises a concern, problem or complaint with you, seek to resolve the situation informally, if you consider that an informal approach is likely to resolve the situation effectively
- P5 Follow your organisation's formal grievance procedure, if an individual raises a grievance with you in writing
- P6 Keep full and accurate records throughout the grievance process and store these confidentially as long as, but no longer than, necessary

# PPL 4GEN21(SQA Unit Code-FM58 04)

## Initiate and follow grievance procedure

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### Knowledge and understanding

*You need to know and understand:*

#### General knowledge and understanding

- K1 The importance of fully informing individuals about your organisation's current procedure for raising grievances
- K2 Informal approaches to dealing with concerns, problems or complaints raised with you, and when this type of approach is likely to resolve the situation effectively
- K3 The importance of following your organisation's formal grievance procedure, and when to do so
- K4 How to conduct a meeting with an individual to discuss their grievance
- K5 How to investigate the grievance fully
- K6 The importance of communicating clearly, concisely and objectively, and how to do so
- K7 How to keep full and accurate records throughout the grievance process and store these confidentially as long as, but no longer than, necessary

#### Industry/sector specific knowledge and understanding

- K8 Industry/sector requirements for implementing grievance procedures

#### Context specific knowledge and understanding

- K9 Your organisation's procedure for dealing with grievances
- K10 Sources of advice, guidance and support from colleagues, human resources or legal specialists
- K11 Your organisation's policies and procedures for keeping full and accurate records

# PPL 4GEN21(SQA Unit Code-FM58 04)

## Initiate and follow grievance procedure

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### Behaviours

- 1 You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding
- 2 You present information clearly, concisely, accurately and in ways that promote understanding
- 3 You keep people informed of plans and developments
- 4 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- 5 You act within the limits of your authority
- 6 You consult with internal and/or external experts when necessary
- 7 You show integrity, fairness and consistency in decision-making
- 8 You keep confidential information secure
- 9 You push for concrete information in an ambiguous situation
- 10 You identify the implications or consequences of a situation

## PPL 4GEN21(SQA Unit Code-FM58 04)

### Initiate and follow grievance procedure

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**Developed by** People 1st

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**Originating organisation** CfA Business Skills @ Work

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**Original URN** M&L D15

---

**Relevant occupations** All Hospitality Managers; Heads of Department

---

**Suite** Hospitality Management

---

**Key words** Initiate; grievance; procedure

---

### Overview

This standard is about initiating and following your organisation's disciplinary procedure in response to misconduct or unsatisfactory performance of a member of your team.

All employing organisations are required to have disciplinary and grievance procedures. As a minimum, these must meet the requirements laid down in relevant employment legislation. However, many organisations have developed more detailed and extensive disciplinary procedures and associated rules to reflect their specific contexts and requirements.

This standard describes the minimum standard of performance expected of managers when they are implementing disciplinary procedures in line with legal and organisational requirements. To meet this standard, managers need both sound technical knowledge of the procedures and well-developed cognitive and interpersonal skills.

The standard is for line managers who have to deal with misconduct or unsatisfactory performance of members of their team. It is **not** designed for human resources specialists who are required to develop disciplinary procedures and provide specialist support to line managers who are implementing them.

This standard is imported from the Leadership and Management 2009 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN22(SQA Unit code-FM57 04)

## Initiate and follow disciplinary procedure

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### Performance criteria

*You must be able to:*

- P1 Keep individuals fully informed about the standards of conduct and performance expected of them and your organisation's current procedure for dealing with misconduct or unsatisfactory performance
- P2 Seek support from colleagues or human resources or legal specialists on any aspects of implementing disciplinary procedures about which you are unsure
- P3 Carry out necessary investigations promptly to establish the facts relating to any misconduct or unsatisfactory performance
- P4 Take preventative measures to resolve issues and deal with cases of minor misconduct or unsatisfactory performance informally, where you consider that an informal approach is likely to resolve the situation effectively
- P5 Follow your organisation's formal disciplinary procedure in serious cases of misconduct or unsatisfactory performance
- P6 Keep full and accurate records throughout the disciplinary process and store these confidentially as long as, but no longer than, necessary



# PPL 4GEN22(SQA Unit Code-FM57 04)

## Initiate and follow disciplinary procedure

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### Knowledge and understanding

*You need to know and understand:*

#### General knowledge and understanding

- K1 The importance of fully informing individuals about the standards of conduct and performance expected of them and your organisation's current procedure for dealing with misconduct or unsatisfactory performance
- K2 How to carry out investigations to establish facts relating to any misconduct or unsatisfactory performance
- K3 Informal approaches to dealing with cases of minor misconduct or unsatisfactory performance, and when this type of approach is likely to resolve the situation effectively
- K4 The differences between misconduct, gross misconduct and unsatisfactory performance, and how each should be handled
- K5 The importance of following your organisation's formal disciplinary procedure in serious cases of misconduct or unsatisfactory performance
- K6 The importance of communicating clearly, concisely and objectively, and how to do so
- K7 How to keep full and accurate records throughout the disciplinary process and store these confidentially as long as, but no longer than, necessary

#### Industry/sector specific knowledge and understanding

- K8 Industry/sector requirements for supporting individuals to improve their performance

#### Context specific knowledge and understanding

- K9 Your organisation's procedures for dealing with misconduct or unsatisfactory performance
- K10 The standards of conduct and performance expected of individuals
- K11 Sources of advice, guidance and support from colleagues, human resources or legal specialists
- K12 The limits of your own knowledge, skills and competence
- K13 Your organisation's policies and procedures for keeping full and accurate records

## PPL 4GEN22(SQA Unit Code-FM57 04)

### Initiate and follow disciplinary procedure

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#### Behaviours

- 1 You listen actively, ask questions, clarify points and rephrase others' statements to check mutual understanding
- 2 You present information clearly, concisely, accurately and in ways that promote understanding
- 3 You keep people informed of plans and developments
- 4 You give feedback to others to help them improve their performance
- 5 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- 6 You act within the limits of your authority
- 7 You consult with internal and/or external experts when necessary
- 8 You say no to unreasonable requests
- 9 You confront performance issues and resolve them directly with the people involved
- 10 You keep confidential information secure
- 11 You work to develop an atmosphere of professionalism and mutual support
- 12 You take and implement difficult and/or unpopular decisions, if necessary

## PPL 4GEN22(SQA Unit Code-FM57 04)

### Initiate and follow disciplinary procedure

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**Developed by** People 1st

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Initiate; disciplinary; procedure; confidentiality; performance; misconduct

# PPL 4GEN23(SQA Unit Code-DR5T 04)

## Manage finance for your area of responsibility



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### Overview

This standard is about managing finance in order to achieve the stated objectives for your area of responsibility. It involves developing and agreeing a master budget for your area and using this to monitor, evaluate and control performance and take action to deal with identified variances. Delegating responsibility for budgets for clearly defined activities is a key aspect of this unit.

The 'area of responsibility' may be, for example, a branch or department or functional area or an operating site within an organisation.

This standard is imported from the Leadership and Management 2009 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN23(SQA Unit Code-DR5T 04)

## Manage finance for your area of responsibility

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### Performance criteria

- You must be able to:*
- P1 Confirm your financial responsibilities, including the limits of your authority, with those you report to
  - P2 Gather and evaluate available financial information and the objectives and associated plans for your area and consult with colleagues to identify priorities, potential problems and risks
  - P3 Identify and make use of opportunities to delegate responsibility for budgets for clearly defined activities to colleagues in your area, providing them with the required ongoing support and resources
  - P4 Discuss and, if appropriate, negotiate delegated budgets with colleagues and agree provisional budgets
  - P5 Consult on and develop a realistic master budget for your area and submit it to the relevant people in the organisation for approval and to assist the overall financial planning process
  - P6 Discuss and, if appropriate, negotiate the proposed master budget for your area with the relevant people in the organisation and communicate the final budget to colleagues in your area
  - P7 Establish systems to monitor and evaluate performance against delegated budgets and the master budget and put contingency plans in place
  - P8 Identify the causes of any significant variances between what was budgeted for and what actually happened and discuss and ensure prompt corrective action is taken, obtaining agreement from the relevant people if required
  - P9 Propose revisions to the master budget, if necessary, in response to variances and/or significant or unforeseen developments and discuss and agree the revisions with the relevant people
  - P10 Provide ongoing information on the financial performance of your area to relevant people in your organisation
  - P11 Advise the relevant people as soon as possible if you have identified evidence of any potentially fraudulent activities
  - P12 Encourage colleagues in your area to think about and identify ways of reducing expenditure and increasing income, selecting and pursuing those ideas which have potential for implementation
  - P13 Review the financial performance of your area, particularly in relation to achievement of the stated objectives, and identify improvements for the future

# PPL 4GEN23(SQA Unit Code-DR5T 04)

## Manage finance for your area of responsibility

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### Knowledge and understanding

*You need to know and understand:*

#### General knowledge and understanding

- K1 The purposes of budgetary systems
- K2 The importance of agreeing financial responsibilities, including the limits of your authority, for your area with those you report to
- K3 Where to get and how to evaluate the available financial information in order to be able to prepare a realistic master budget for your area
- K4 The importance of taking account of the objectives and associated plans of your area in developing and operating the master budget
- K5 How to identify opportunities and delegate responsibility for budgets
- K6 The importance of consulting with colleagues in identifying priorities, potential problems and risks and generally preparing the budget for your area
- K7 How to discuss, negotiate and confirm budgets with colleagues in your area and with people who control the finance and the key factors that should be covered
- K8 How to establish systems to monitor and evaluate performance against budgets
- K9 The importance of contingency plans and the type of contingencies that may occur
- K10 The main causes of variances and how to identify them
- K11 What different types of corrective action could be taken to address identified variances
- K12 The importance of agreeing revisions to the budget and communicating the changes
- K13 The importance of providing regular information on the financial performance of your area to relevant people and what they might want to know
- K14 Types of fraudulent activities and how to identify them
- K15 How to encourage colleagues to think about ways of reducing expenditure and increasing income
- K16 How to review the financial performance of your area against the stated objectives

#### Industry/sector specific knowledge and understanding

- K17 Factors, processes and trends that are likely to affect financial management in your industry/sector
- K18 Legal, regulatory and ethical requirements in the industry/sector

#### Context specific knowledge and understanding

- K19 The scope and nature of your area of responsibility including the vision, objectives and operational plans
- K20 Your financial responsibilities, including the limits of your authority

## PPL 4GEN23(SQA Unit Code-DR5T 04)

### Manage finance for your area of responsibility

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- K21 The people you report to in your organization
- K22 Financial information available in your organisation
- K23 Activities for which budgets have been delegated
- K24 The budgeting period(s) used in your organisation
- K25 Organisational guidelines and procedures for the preparation and approval of budgets and for monitoring and reporting of performance against budgets and revising budgets
- K26 The agreed master budget for your area, including delegated budgets
- K27 Systems established for managing and evaluating performance against budgets
- K28 Contingency plans put in place
- K29 What to do and who to contact if you suspect fraud has been committed
- K30 Who needs information on the financial performance of your area, what information they need, when they need it and in what format

# PPL 4GEN23(SQA Unit Code-DR5T 04)

## Manage finance for your area of responsibility

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### Behaviours

- 1 You act within the limits of your authority
- 2 You are vigilant for potential risks
- 3 You develop systems to gather and manage information and knowledge effectively, efficiently and ethically
- 4 You clearly agree what is expected of others and hold them to account
- 5 You respond quickly to crises and problems with a proposed course of action
- 6 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- 7 You prioritise objectives and plan work to make best use of time and resources
- 8 You use communication styles that are appropriate to different people and situations
- 9 You take and implement difficult and/or unpopular decisions, if necessary



## PPL 4GEN23(SQA Unit Code-DR5T 04)

### Manage finance for your area of responsibility

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**Developed by** People 1st

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**Version number** 1

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**Date approved** October 2011

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**Validity** Current

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**Status** Imported

---

**Originating organisation** CfA Business Skills @ Work

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**Original URN** M&L E2

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Finance; financial; performance; budget

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### Overview

However effectively customer service is organised, customers make complaints from time to time. In some organisations, it is simply a matter of procedure for all complaints to be handled by particular people. Sometimes, front-line staff or supervisors can deal with these complaints, however, often more senior staff must deal with the complaint.

This is either because of the severity of the complaint and its implications for the organisation, or because the customer will accept the solution only if it is dealt with at a senior level. This may require someone with the authority and influence to adapt existing policies and procedures to find an acceptable solution. It is also important for this person to explore patterns and trends in significant complaints and recommend changes to policies and procedures to avoid repetition.

This standard is imported from the Customer Service 2010 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN24(SQA Unit Code-FE3P 04)

## Handle referred customer complaints

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### Performance criteria

#### Investigate referred customer complaints

- You must be able to:*
- P1 Collect all the available information on the nature of the complaint and identify and analyse the organisational implications of the complaint
  - P2 Take personal responsibility for dealing with the complaint subject to the limits of your authority
  - P3 Keep your customer informed about what steps are being taken to deal with their complaint
  - P4 Follow the correct procedures if your customer wishes to escalate the complaint even higher or if the complaint has wider implications for the organisation

#### Take action to deal with referred customer complaints

- You must be able to:*
- P5 Identify a range of possible solutions that balance customer expectations and your organisation's service offer
  - P6 Liaise with your customer and colleagues to negotiate an acceptable solution
  - P7 Agree a solution that adapts current policies and procedures within your own authority and furthers your organisation's aims and objectives
  - P8 Implement the agreed solution and liaise with your customer to ensure that they are satisfied with the action that has been taken

#### Identify repeated customer complaints and recommend changes to policies and procedures

- You must be able to:*
- P9 Identify patterns and trends in customer complaints
  - P10 Analyse trends in customer complaints
  - P11 Identify solutions acceptable to your customers that fit your organisation's service offer
  - P12 Identify possible changes to customer service policies and procedures
  - P13 Consider the benefits and drawbacks of each possible change in terms of balancing customer service and organisational aims
  - P14 Select an option for change and follow organisational procedures to ensure that your recommendations come to the attention of decision makers

## PPL 4GEN24(SQA Unit Code-FE3P 04)

### Handle referred customer complaints

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#### Knowledge and understanding

*You need to know and understand:*

- K1 The importance of minimising customer complaints and dealing with them effectively and promptly when they occur
- K2 Your organisation's complaints procedures and the limits of your authority
- K3 The procedures you must follow if a complaint is likely to be escalated or have wider implications
- K4 The types of complaints that could have wider implications for your organisation
- K5 Why it is important to communicate with your customer at all stages of a complaints procedure
- K6 How to devise solutions that balance customer expectations and organisational aims
- K7 Why it is important to identify and present to the customer a range of possible options
- K8 Why it may be necessary sometimes to adapt organisational policies and procedures to provide a solution acceptable to your customer and how you could justify this
- K9 How to identify trends and patterns in customer complaints and solutions
- K10 How to explore the implications of these patterns and trends for your organisation's policies and procedures
- K11 How to recommend changes to organisational policies and procedures

## PPL 4GEN24(SQA Unit Code-FE3P 04)

### Handle referred customer complaints

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**Developed by** People 1st

---

**Version number** 1

---

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---

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**Status** Imported

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**Originating organisation** CfA Business Skills @ Work

---

**Original URN** CS C8

---

**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Customer; service; complaints; handle

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# PPL 4GEN25(SQA Unit Code-FE2W 04)

## Use customer service as a competitive tool



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### Overview

Customer service contributes to an organisation's competitive position. Customers of many organisations have choice about the services or products they use and who supplies them. Often the technical features and cost of the service or product are almost identical. If this is the case, the quality of the customer service offered makes all the difference about which supplier the customer chooses.

This standard is about how you can play your part in ensuring that your organisation makes the best possible use of the competitive advantage that can be gained from offering superior customer service. It covers how you use customer service as a tool to compete effectively with other providers of similar services and products. The standard is not for you if your organisation does not compete actively with others.

This standard is imported from the Customer Service 2010 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN25(SQA Unit Code-FE2W 04)

## Use customer service as a competitive tool

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### Performance criteria

#### Plan how to measure customer service

- You must be able to:*
- P1 Identify the features of customer service delivery that affect customer satisfaction
  - P2 Plan how you will monitor the features of customer service delivery that affect customer satisfaction
  - P3 Plan how you will analyse the information you have collected

#### Collect and analyse information on customer service

- You must be able to:*
- P4 Implement your plans for monitoring customer service processes and outcomes
  - P5 Analyse the monitoring information you have collected
  - P6 Compare the conclusions of your analysis with the criteria you identified
  - P7 Adapt your plans if the agreed methods of collecting and analysing information are not proving effective
  - P8 Communicate the results of your measurement of customer service to colleagues
  - P9 Agree actions to improve customer service that result from your measurements and analysis

# PPL 4GEN25(SQA Unit Code-FE2W 04)

## Use customer service as a competitive tool

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### Knowledge and understanding

*You need to know and understand:*

- K1 The importance of measuring the quality of customer service
- K2 How to identify which aspects of the customer service process affect customer satisfaction
- K3 How to select the criteria you will use for measurement of customer service
- K4 How to construct representative samples
- K5 The types of information collection methods you could use
- K6 Methods of analysing information on the quality of customer service
- K7 How to identify recommendations that flow from your measurement of customer service
- K8 The procedures for making recommendations on customer service improvements within your organisation



## PPL 4GEN25(SQA Unit Code-FE2W 04)

### Use customer service as a competitive tool

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**Developed by** People 1st

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**Original URN** CS A14

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**Relevant occupations** All Hospitality Managers; Heads of Department

---

**Suite** Hospitality Management

---

**Key words** Customer; service; competitive; analyse; features; methods; quality

## PPL 4GEN26(SQA Unit Code-FE2X 04)

### Organise the promotion of additional services or products to customers



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#### Overview

This standard is about expanding and extending the relationship with your customers by persuading them to make use of additional services and products that you can offer. Your services or products will remain viable only if they are used by customers. The standard covers the way you organise customer service to promote additional use of your services or products by communicating with customers and then delivering those services or products effectively.

It is also about monitoring your successes and failures and recognising the best way to approach your customers with additional services or products for the future. You need to show that you are promoting the services or products by encouraging more people to use them.

This standard is imported from the Customer Service 2010 suite, overseen by CfA Business Skills @ Work.

## PPL 4GEN26(SQA Unit Code-FE2X 04)

### Organise the promotion of additional services or products to customers

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#### Performance criteria

#### Offer additional services or products

*You must be able to:*

- P1 Offer additional services or products to your customers
- P2 Identify the benefits of offering additional services or products for your customers and the organisation
- P3 Explain the features and benefits of additional services or products to your customers
- P4 Identify ways of encouraging customers to ask about additional services or products

#### Organise support to promote use of additional services or products

*You must be able to:*

- P5 Discuss with others ways of promoting additional services or products to your customers
- P6 Implement procedures to ensure that customers interested in additional services or products are dealt with promptly
- P7 Promote services or products which will suit your customers but which are supplied from outside your own area of the organisation
- P8 Help customers to access services or products which are supplied outside of your own area of the organisation

#### Monitor the promotion of additional services or products

*You must be able to:*

- P9 Devise methods to inform customers about additional services or products
- P10 Use different methods to inform customers about additional services and products and record successes and failures against each method
- P11 Use your record of successes and failures to identify the best approach for offering additional services or products
- P12 Share information with others regarding the best approach to take when offering additional services or products to your customers

## PPL 4GEN26(SQA Unit Code-FE2X 04)

### Organise the promotion of additional services or products to customers

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#### Knowledge and understanding

*You need to know and understand:*

- K1 Your organisation's procedures and systems for encouraging the use of additional services or products
- K2 How the use of additional services or products will benefit your customers
- K3 The main factors that influence customers to use your services or products
- K4 How to introduce additional services or products to your customers outlining their benefits, overcoming reservations and agreeing to provide the additional services or products
- K5 How to give appropriate, balanced information to your customers about services or products

## PPL 4GEN26(SQA Unit Code-FE2X 04)

Organise the promotion of additional services or products to customers

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**Developed by** People 1st

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**Originating organisation** CfA Business Skills @ Work

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**Original URN** CS A15

---

**Relevant occupations** All Hospitality Managers; Heads of Department

---

**Suite** Hospitality Management

---

**Key words** Customer; service; promotion; additional; products; promote; benefits

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### Overview

People managing customer service need to know how effectively it is being delivered. Without this information, they have no way of knowing if their customers are satisfied and are likely to remain loyal. They also need to know what to do to improve customer service to meet and exceed customer expectations.

This standard is about planning how you measure standards of customer service by collecting and analysing information. You must develop conclusions and recommendations and then report your findings to relevant people. Most of all, this standard is about approaching the review of customer service quality systematically and making full use of your findings.

This standard is imported from the Customer Service 2010 suite, overseen by CfA Business Skills @ Work.

# PPL 4GEN27(SQA Unit Code-FE3L 04)

## Review the quality of customer service

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### Performance criteria

#### Plan how to measure customer service

*You must be able to:*

- P1 Identify the features of customer service delivery that affect customer satisfaction
- P2 Plan how you will monitor the features of customer service delivery that affect customer satisfaction
- P3 Plan how you will analyse the information you have collected

#### Collect and analyse information on customer service

*You must be able to:*

- P4 Implement your plans for monitoring customer service processes and outcomes
- P5 Analyse the monitoring information you have collected
- P6 Compare the conclusions of your analysis with the criteria you identified
- P7 Adapt your plans if the agreed methods of collecting and analysing information are not proving effective
- P8 Communicate the results of your measurement of customer service to colleagues
- P9 Agree actions to improve customer service that result from your measurements and analysis

## PPL 4GEN27(SQA Unit Code-FE3L 04)

### Review the quality of customer service

---

#### Knowledge and understanding

*You need to know and understand:*

- K1 The importance of measuring the quality of customer service
- K2 How to identify which aspects of the customer service process affect customer satisfaction
- K3 How to select the criteria you will use for measurement of customer service
- K4 How to construct representative samples
- K5 The types of information collection methods you could use
- K6 Methods of analysing information on the quality of customer service
- K7 How to identify recommendations that flow from your measurement of customer service
- K8 The procedures for making recommendations on customer service improvements within your organisation



## PPL 4GEN27(SQA Unit Code-FE3L 04)

### Review the quality of customer service

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**Original URN** CS B14

---

**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Customer; service; plan; collect; compare; review; quality

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# PPL HSL28(SQA Unit Code-HSL8 04)

## Manage the environmental impact of your work



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### Overview

This standard is about managing work activities and resources in your area of responsibility in order to minimise the negative impact and maximise the positive impact they may have on the environment.

This standard is imported from the Leadership and Management 2009 suite, overseen by CfA Business Skills @ Work.

# PPL HSL28(SQA Unit Code-F2H3 04)

## Manage the environmental impact of your work

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### Performance criteria

- You must be able to:*
- P1 Organise work activities and the use of resources in your area of responsibility so that they are:
    - efficient and effective
    - comply with legal requirements and environmental policies
    - minimise the negative and maximise the positive impact on the environment
  - P2 Identify the environmental impact of work activities and the use of resources in your area of responsibility
  - P3 Report promptly any identified risks to the environment, which you do not have the ability to control
  - P4 Encourage people in your area of responsibility to identify opportunities for, and contribute to, improving environmental performance
  - P5 Identify and implement changes to work activities and the use of resources that will reduce the negative and increase the positive impact on the environment
  - P6 Communicate the environmental benefits resulting from changes to work activities and the use of resources
  - P7 Obtain specialist advice, where necessary, to help you identify and manage the environmental impact of your work activities and use of resources

# PPL HSL28(SQA Unit Code-F2H3 04)

## Manage the environmental impact of your work

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### Knowledge and understanding

*You need to know and understand:*

#### General knowledge and understanding

- K1 How to organise work activities and the use of resources in your area of responsibility so that they are efficient and effective
- K2 The importance of organising work activities and the use of resources so that they minimise their negative and maximise their positive environmental impact, and how to do so
- K3 The importance of identifying the environmental impact of work activities and the use of resources in your area of responsibility, and how to do so
- K4 The importance of reporting promptly any identified risks to the environment which you do not have the ability to control, and how to do so
- K5 How to encourage people to make contributions
- K6 How to identify and implement changes to work activities and the use of resources that will reduce their negative and increase their positive environmental impact
- K7 The principles of effective communication and how to apply them

#### Industry/sector specific knowledge and understanding

- K8 Industry/sector requirements for managing environmental performance in your area of responsibility

#### Context specific knowledge and understanding

- K9 Legal requirements and environmental policies and how to comply with them
- K10 The types of risks to the environment, which you do not have the ability to control
- K11 People in your area of responsibility who are able to contribute to, and identify opportunities for improving environmental performance
- K12 The range of environmental specialists that exist inside and/or outside your organisation
- K13 Your role, responsibilities and limits of your authority

# PPL HSL28(SQA Unit Code-F2H3 04)

## Manage the environmental impact of your work

---

### Behaviours

- 1 You recognise changes in circumstances promptly and adjust plans and activities accordingly
- 2 You present information clearly, concisely, accurately and in ways that promote understanding
- 3 You keep people informed of plans and developments
- 4 You comply with, and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- 5 You act within the limits of your authority
- 6 You are vigilant for possible hazards
- 7 You make appropriate information and knowledge available promptly to those who need it and have a right to it
- 8 You encourage others to share information and knowledge efficiently within the constraints of confidentiality
- 9 You make best use of available resources and proactively seek new sources of support when necessary
- 10 You identify the implications or consequences of a situation

## PPL HSL28(SQA Unit Code-F2H3 04)

### Manage the environmental impact of your work

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**Original URN** M&L E9

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**Relevant occupations** All Hospitality Managers; Heads of Department

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**Suite** Hospitality Management

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**Key words** Manage; environment; work; compliance; policy; resources

# PPL 4KM31fGE 5 'I b]h7 cXY!< &MF '\$( Ł

Participate in the design, implementation and monitoring of a kitchen food safety management system



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## Overview

This standard is for those in charge of kitchen operations, to help devise and implement procedures and to maintain the kitchen environment to a high standard with regards to food hygiene and safety. Its aim is to ensure that procedures and systems are in place, implemented and monitored to the highest possible standard.

## PPL 4KM31fGE 5 'I bJh7 cXYI< &MF `\$( Ł

### Participate in the design, implementation and monitoring of a kitchen food safety management system

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#### Performance criteria

#### Help to design a kitchen food safety management system

*You must be able to:*

- P1 Gather information on food safety management from available sources
- P2 Analyse the legislative requirements for food safety to ensure compliance
- P3 Analyse the risks for food safety from a variety of hazards
- P4 Examine and review current procedures and practices to establish new processes, where appropriate
- P5 Record information accurately for ease of retrieval
- P6 Allocate resources and roles and responsibilities for specific aspects of the food safety system
- P7 Establish protocols for cleaning, pest control, chemical control, use and storage, personal protective equipment use, food holding and storage, food handling, supplier delivery and storage

#### Implement and monitor a kitchen food safety management system

*You must be able to:*

- P8 Make appropriate changes to working practices according to the food safety management system
- P9 Communicate food safety management procedures to staff and train staff in requirements
- P10 Ensure all visitors, suppliers and staff comply with procedures laid down
- P11 Manage suppliers and procedures for food stock delivery, storage and holding
- P12 Keep accurate and appropriate records on food safety management and monitor regularly
- P13 Carry out regular risk assessments to ensure potential risks are eliminated or minimised and food safety is maintained
- P14 Collect and evaluate feedback on the implementation of procedures and evaluate against plans
- P15 Establish corrective actions to control food safety hazards
- P16 Ensure due diligence is exercised in the implementation of the food safety system



## PPL 4KM31fGE 5 'I bJh7 cXYI< &MF `\$( Ł

Participate in the design, implementation and monitoring of a kitchen food safety management system

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### Knowledge and understanding

*You need to know and understand:*

- K1 How the design layout, use and maintenance of the food area can affect food safety
- K2 The current and ongoing legislative and compliance requirements and the penalties and dangers of non-compliance
- K3 The fundamental requirements of risk assessments and why they are needed (HACCP)
- K4 How to establish food safety management procedures
- K5 What are potential hazards to food safety
- K6 The organisation's policy for reporting hazards
- K7 Which records need to be regularly monitored and why
- K8 How to evaluate feedback
- K9 How to secure training resources
- K10 The responsibilities of all staff concerning food safety management
- K11 The controls required for food safety
- K12 How food business operators can ensure compliance
- K13 The due diligence process

# PPL 4KM31(SQA Unit code-H2YR 04)

## Participate in the design, implementation and monitoring of a kitchen food safety management system

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### Scope/range

#### 1 Risks

- 1.1 physical
- 1.2 chemical
- 1.3 allergenic

#### 2 Resources

- 2.1 equipment
- 2.2 supplies
- 2.3 staff
- 2.4 time
- 2.5 money
- 2.6 facilities

#### 3 Working Practices

- 3.1 range of dishes on your menu(s)
- 3.2 sourcing safe supplies and information on ingredients
- 3.3 stages in food preparation, cooking and service
- 3.4 range of equipment used, premises and work environment
- 3.5 storage
- 3.6 waste management
- 3.7 infestation management

#### 4 Training

- 4.1 identifying training needs
- 4.2 determining staff training methods
- 4.3 implementing a training programme
- 4.4 allocation of staff to posts that make good use of training received

## **PPL 4KM31(SQA Unit Code-H2YR 04)**

Participate in the design, implementation and monitoring of a kitchen food safety management system

---

### **Glossary**

#### **Available sources**

Internal; staff, management; records; customer feedback; relevant inspection authorities

#### **Current procedures and practices**

*Including those relating to:* layout, design, construction, maintenance of equipment, premises, use of staff, activities of suppliers, visitors

#### **HACCP**

Hazard Analysis Critical Control Point

## **PPL 4KM31(SQA Unit Code-H2YR 04)**

Participate in the design, implementation and monitoring of a kitchen food safety management system

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**Developed by** People 1st

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**Version number** 1

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**Date approved** October 2011

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**Validity** Current

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**Status** Original

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**Originating organisation** People 1st

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**Original URN** PPL 4KM31

---

**Relevant occupations** Kitchen Manager; Head Chef; Executive Chef; Development Chef

---

**Suite** Hospitality Management

---

**Key words** Food safety; implement procedures; kitchen; programme; risks; hazards; controls; compliance; training

## PPL 4KM32(SQA Unit Code-H2YS 04)

Develop and evolve dishes and recipes showing innovation and creativity



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### Overview

This standard is about creating dishes, testing and using recipes to develop a menu consistent with the standards of the organisation.

The development of dishes and recipes must take into account restrictions of seasonality, sourcing of local or other produce and ingredients, and the impact on costs. It must aim to ensure that dishes will enhance the reputation of the organisation.

## PPL 4KM32(SQA Unit Code-H2YS 04)

Develop and evolve dishes and recipes showing innovation and creativity

---

### Performance criteria

#### Develop and introduce dishes and recipes

*You must be able to:*

- P1 Create dishes that are innovative and use a range of different produce
- P2 Follow and adapt recipes that are suitable to the organisation's style
- P3 Develop recipes taking into account the available resources and cost
- P4 Seek ideas for dishes from reliable sources
- P5 Establish ingredient ratios, cooking times and temperatures for producing the recipe in varying quantities and for full service
- P6 Keep accurate records and costing sheets on information about recipes and dishes developed
- P7 Test dishes and recipes on appropriate people in the organisation
- P8 Ensure that dishes and recipes developed show an understanding of food combinations, flavour and dietary requirements of the organisation's customer base, and relevant legislation
- P9 Introduce recipes within the context of a suitable menu

#### Cost dishes and recipes

*You must be able to:*

- P10 Develop dishes and recipes taking account of financial considerations relevant to the organisation
- P11 Establish portion yield accurately
- P12 Cost the ingredients required accurately
- P13 Cost dishes according to the quantity produced
- P14 Devise menu taking into account existing supplies and use of ingredients in multiple dishes

## PPL 4KM32(SQA Unit Code-H2YS 04)

Develop and evolve dishes and recipes showing innovation and creativity

---

### Knowledge and understanding

*You need to know and understand:*

#### Develop and introduce dishes and recipes

- K1 The organisation's policies regarding costs and style of new dishes and recipes
- K2 The organisation's preferences with regards to introducing new menu items
- K3 How to review the suitability of new recipes
- K4 How to monitor the progress of dish and recipe development
- K5 Where to obtain information about new recipes, ingredients and dietary requirements
- K6 How to get feedback on proposed new dishes and recipes
- K7 How to accurately record new dishes and recipe information
- K8 How to analyse the nutritional content of recipes and dishes

#### Cost dishes and recipes

*You need to know and understand:*

- K9 How to calculate portion yield
- K10 The implication of new dishes and recipes on existing resources
- K11 How to identify new resource requirements
- K12 How quantity can affect buying costs

# PPL 4KM32(SQA Unit Code-H2YS 04)

Develop and evolve dishes and recipes showing innovation and creativity

---

## Scope/range

- 1 Customer base**
  - 1.1 current and future customer base
  - 1.2 target markets
  
- 2 Dietary requirements**
  - 2.1 nutritional balance
  - 2.2 religious
  - 2.3 medical
  - 2.4 allergens
  - 2.5 vegan/vegetarian
  - 2.6 cultural
  
- 3 Resources**
  - 3.1 staff
  - 3.2 equipment
  - 3.3 supplies
  - 3.4 time
  - 3.5 money
  - 3.6 facilities
  - 3.7 waste management



## **PPL 4KM32(SQA Unit Code-H2YS 04)**

Develop and evolve dishes and recipes showing innovation and creativity

---

### **Glossary**

#### **Range of different products includes**

Local or company approved providers; seasonality; different types of produce, meat, fish, poultry, vegetables

## **PPL 4KM32(SQA Unit Code-H2YS 04)**

Develop and evolve dishes and recipes showing innovation and creativity

---

**Developed by** People 1st

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**Version number** 1

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**Originating organisation** People 1st

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**Original URN** PPL 4KM32

---

**Relevant occupations** Kitchen Manager; Head Chef; Executive Chef; Development Chef

---

**Suite** Hospitality Management

---

**Key words** Recipes; dishes; innovation; development; menu; dietary requirement

## PPL 4KM33(SQA Unit Code-H2YT 04)

Develop and deliver a menu which meets organisational standards and financial targets



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### Overview

This standard is about planning and developing a menu that is consistent with the service offered by the organisation. The menu must suit the needs of the organisation's existing customer base and target market, while meeting financial targets. The aim of the standard is to ensure that those people ultimately responsible for providing a menu, balance costs and quality, and satisfy the dining experience of the customer.

## PPL 4KM33(SQA Unit Code-H2YT 04)

Develop and deliver a menu which meets organisational standards and financial targets

---

### Performance criteria

*You must be able to:*

#### Plan menus

- P1 Gather information about customer requirements from a variety of sources
- P2 Take account of the skills, experience and training needs of staff
- P3 Plan menus according to the equipment and facilities available
- P4 Plan future menu development according to the organisation's business plans
- P5 Consult with relevant people within the organisation
- P6 Devise a menu which is logistically viable in terms of preparation times and kitchen protocols
- P7 Take account of the sources of produce and ensure supply is consistent with the menu plan i.e. seasonal/local

#### Develop menus

*You must be able to:*

- P8 Take account of customer base, dietary requirements and financial needs
- P9 Source the produce required at a price that allows optimum profit margins
- P10 Obtain the produce required from guaranteed sources that meet the organisation's quality standards
- P11 Use local seasonal produce where possible and appropriate
- P12 Include combinations of recipes that conform to the organisation's style of service and produce a balanced menu, ensuring they are creative and imaginative
- P13 Keep accurate records
- P14 Ensure menu descriptions are consistent with legal requirements
- P15 Regularly review and update the menu
- P16 Develop dishes and menus suitable for different functions
- P17 Produce the right menu for the quantities of food to be produced

#### Cost menus

*You must be able to:*

- P18 Consider the restrictions of seasonality and the impact on costs in menu calculations
- P19 Calculate the proportions of the main component to accompaniments in dishes and the cost when multiplied by varying numbers according to service
- P20 Calculate the sales mix and the balance of price and offers
- P21 Gather information on the main sources of revenue for the menu
- P22 Cost the use of energy and sustainable food production
- P23 Calculate cost to profit margin ratios in line with organisational policy
- P24 Calculate staffing ratios
- P25 Cost produce to accurately price dishes

## PPL 4KM33(SQA Unit Code-H2YT 04)

Develop and deliver a menu which meets organisational standards and financial targets

---

### Knowledge and understanding

*You need to know and understand:*

#### Plan menus

- K1 The principles of the development, trial and testing of new recipes
- K2 The organisation's policy on costs and menu style
- K3 Current legislation, dietary consideration and health, safety and hygiene requirements
- K4 How to gather information relevant to menu planning e.g. customer data, revenue figures
- K5 How to assess that menus conform to organisational policy and legislation

#### Develop menus

*You need to know and understand:*

- K6 The target market of the organisation and their requirements
- K7 Different dishes and menus suitable for different formats of service
- K8 How to balance menus
- K9 How to use resources effectively
- K10 How to source appropriate nutritional guidelines
- K11 How to analyse the nutritional make up of menus
- K12 How to resource new ideas for menus
- K13 The organisation's buying procedures for produce

#### Cost menus

*You need to know and understand:*

- K14 How to cost dishes and menus
- K15 The organisation's green policy
- K16 Usage costs, equipment costs and revenue from various sources
- K17 How to deal with and manage suppliers
- K18 Latest trends and customer preferences
- K19 The impact of wider changes in the economy, the current economic climate and its potential impact
- K20 The scope and limitations of available equipment
- K21 The current market price of produce

# PPL 4KM33(SQA Unit Code- H2YT 04)

Develop and deliver a menu which meets organisational standards and financial targets

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## Scope/range

- 1 Dietary requirements**
  - 1.1 nutritional balance
  - 1.2 medical
  - 1.3 allergens
  - 1.4 religious
  - 1.5 vegan/vegetarian
  - 1.6 cultural
  
- 2 Resources**
  - 2.1 staff
  - 2.2 equipment
  - 2.3 supplies
  - 2.4 facilities
  - 2.5 time
  - 2.6 money
  - 2.7 waste management
  
- 3 Functions**
  - 3.1 conferences
  - 3.2 weddings
  - 3.3 fine dining events
  
- 4 Menus**
  - 4.1 breakfast
  - 4.2 lunch
  - 4.3 dinner
  - 4.4 afternoon tea
  - 4.5 snack
  - 4.6 functions/special event menus
  
- 5 Cost information**
  - 5.1 cost-to-profit ratios
  - 5.2 revenue figures
  - 5.3 energy costs
  - 5.4 staffing costs

## **PPL 4KM33(SQA Unit Code-H2YT 04)**

Develop and deliver a menu which meets organisational standards and financial targets

---

### **Glossary**

#### **Sources of data available**

For example: sales, popular and innovative menu items, alternative recipe sources, customer perception or satisfaction surveys

#### **Sources of produce**

For example: approved quality suppliers, alternative suppliers, provenance, quality stamps, range of acceptable produce, seasonality, foraged food

#### **Sustainability**

Carbon footprint, ethical moral process in relation to supply chain

## **PPL 4KM33(SQA Unit Code-H2YT 04)**

Develop and deliver a menu which meets organisational standards and financial targets

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**Developed by** People 1st

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**Version number** 1

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**Status** Original

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**Originating organisation** People 1st

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**Original URN** PPL 4KM33

---

**Relevant occupations** Kitchen Manager; Head Chef; Executive Chef; Development Chef

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**Suite** Hospitality Management

---

**Key words** Menus; costs; financial targets



## PPL 4KM34(SQA Unit Code-H2YV 04)

Manage the presentation and portion size of dishes in accordance with organisational standards



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### Overview

This standard covers the requirement to control the presentation and portion size of food that emerges from a commercial kitchen. The presentation and portion size needs to meet organisational standards and guidelines, in order to ensure the efficient use of resources, and/or the maximisation of profits. It must also meet the organisation's objectives in terms of enhancing the experience of the customer or recipient as well as the reputation of the organisation.

## PPL 4KM34(SQA Unit Code-H2YV 04)

### Manage the presentation and portion size of dishes in accordance with organisational standards

---

#### Performance criteria

#### Ensure the portion size meets organisational standards

*You must be able to:*

- P1 Ensure that the correct portion size for each dish is communicated to kitchen staff
- P2 Ensure that portion size is calculated with regards to the reduction of waste, and cost to profit margin ratios
- P3 Calculate portion size based on appropriate presentation protocols to ensure customers obtain value for money
- P4 Ensure the correct tools and equipment are available for calculating and serving correct portion size
- P5 Carry out regular monitoring and review of meal portion size before food leaves the kitchen
- P6 Ensure organisational standards on portion size are communicated to staff
- P7 Use appropriate communication methods to relay information on portion size, according to the specific needs of staff
- P8 Ensure that portion size fulfils the marketing and promotional messages of the organisation
- P9 Link business based decisions on portion size to results

#### Ensure presentation meets organisational standards

*You must be able to:*

- P10 Communicate presentation requirements to kitchen staff
- P11 Use appropriate communication methods to relay information on presentation according to the specific needs of staff
- P12 Ensure presentation meets the marketing and promotional messages of the organisation
- P13 Put procedures in place to ensure staff have the appropriate training on presentation styles
- P14 Ensure that appropriate equipment is available and in the correct amounts to ensure presentation is as required
- P15 Carry out regular monitoring and review of food presentation before food leaves the kitchen

## PPL 4KM34(SQA Unit Code-H2YV 04)

### Manage the presentation and portion size of dishes in accordance with organisational standards

---

#### Knowledge and understanding

*You need to know and understand:*

#### Ensure the portion size meets organisational standards

- K1 The organisational standard on portion control
- K2 The costs of waste and inefficiency
- K3 How to reduce waste through portion control as a method for maximising profit
- K4 The relationship of portion control to cost and profit margin ratios
- K5 Business measures and key performance indicators
- K6 The return on investment of business decisions and actions
- K7 The organisation's marketing and promotional messages
- K8 How to train staff and communicate the reasons for good portion control so that staff understand why it is important

#### Ensure presentation meets organisational standards

*You need to know and understand:*

- K9 Why presentation is important
- K10 The organisation's presentational standards
- K11 Different types of presentation and where and when they are appropriate
- K12 How best to communicate different presentational approaches to staff
- K13 How to make sure staff understand your requirements for presentation
- K14 The best equipment for good presentation of food
- K15 Why it is important to adhere to organisational standards
- K16 Where information on organisational standards can be obtained
- K17 How menu items should be prepared to ensure that organisational standards are maintained

## **PPL 4KM34(SQA Unit Code-H2YV 04)**

Manage the presentation and portion size of dishes in accordance with organisational standards

---

### **Scope/range**

#### **1 Methods of relaying information**

- 1.1 verbally
- 1.2 written
- 1.3 pictorial

#### **2 Appropriate equipment**

- 2.1 kitchen tools
- 2.2 servers
- 2.3 crockery
- 2.4 glassware
- 2.5 cooking dishes

#### **3 Marketing and promotional messages**

- 3.1 menus
- 3.2 pictures
- 3.3 information in literature supplied by the organisation
- 3.4 newspapers in which the marketing message may be featured
- 3.5 magazines in which the marketing message may be featured

## **PPL 4KM34(SQA Unit Code-H2YV 04)**

Manage the presentation and portion size of dishes in accordance with organisational standards

---

**Developed by** People 1st

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**Original URN** PPL 4KM34

---

**Relevant occupations** Kitchen Manager; Head Chef; Executive Chef; Development Chef

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**Suite** Hospitality Management

---

**Key words** Portion size; portion control; presentation of food; organisational standards

## PPL 4KM35(SQA Unit Code-H2YW 04)

Manage a team to prepare, cook and present food to organisational standards



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### Overview

This standard is about co-ordination and management of people in the provision of food to achieve the organisation's commercial and business objectives. Head chefs, executive chefs and kitchen managers have to ensure that teams, management structure, resources and knowledge are in place in the correct balance to ensure that the cost-effective, profitable, efficient, and safe preparation and production of food is achieved, according to the organisation's style and business targets.

## PPL 4KM35(SQA Unit Code-H2YW 04)

### Manage a team to prepare, cook and present food to organisational standards

---

#### Performance criteria

*You must be able to:*

#### Plan food preparation and production

- P1 Allocate appropriate people and resources to the required tasks according to the style of service and the menu
- P2 Ensure that the appropriate team structure is in place to guarantee the smooth running of operations in the different food preparation and production sections
- P3 Implement processes to ensure that working arrangements are managed fairly and consistently and lead to allocation of people with appropriate skills to particular tasks
- P4 Have arrangements in place with appropriate suppliers according to the nature and style of service of the organisation
- P5 Ensure that procedures are in place to check that required stocks are always available
- P6 Regularly inspect and update food production arrangements
- P7 Agree work allocations with staff to meet preparation and food production commitments and keep staff motivated
- P8 Have contingency plans to deal with problems as they arise
- P9 Continually review procedures in the light of experience and problems arising during service
- P10 Plan food preparation and production to ensure it is carried out sustainably

#### Manage food preparation and production operations

*You must be able to:*

- P11 Agree objectives and work plans with teams and individuals
- P12 Ensure that all staff are trained appropriately
- P13 Make sure that work plan objectives and food preparation and production procedures, make the best use of resources
- P14 Review work constantly throughout service to minimise or overcome problems as they arise
- P15 Monitor production yield, portion control and costs to ensure budgetary targets are achieved
- P16 Comply with relevant legislation and organisational policy when preparing and producing food
- P17 Monitor the presentation of food to ensure that it is within organisational standards
- P18 Record all relevant information to do with food preparation and production before and during service
- P19 Pass on any information recorded to the appropriate person within the organisation
- P20 Ensure that food produced meets customer requirements

## **PPL 4KM35(SQA Unit Code-H2YW 04)**

### **Manage a team to prepare, cook and present food to organisational standards**

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- P21 Make sure that staff follow instructions in any format in which they are given
- P22 Evaluate and provide feedback to teams and individuals regarding the details of food preparation and production



## PPL 4KM35(SQA Unit Code-H2YW 04)

### Manage a team to prepare, cook and present food to organisational standards

---

#### Knowledge and understanding

*You need to know and understand:*

#### Plan food preparation and production

- K1 Staff skills, strengths and development needs and how to utilise them effectively
- K2 How to assess the skills of staff and the whole team
- K3 Techniques to assess resource requirements and costs
- K4 How plans fit in with the organisation's procedures and business objectives
- K5 What budgets and resources are available
- K6 The different needs of staff when making plans or allocating responsibilities
- K7 Where to get relevant information for planning
- K8 Different methods of work scheduling
- K9 Why contingency plans are needed
- K10 How allocation of the correct staff to roles affects team performance
- K11 What methods can be used to minimise the impacts of changes to work allocations
- K12 How to implement training and induction programmes
- K13 How to estimate realistic targets and deadlines

#### Manage food preparation and production operation

*You need to know and understand:*

- K14 How food production impacts on other departments in the organisation and services to the customer
- K15 Current legislation impacting on food production operations
- K16 The importance of protecting the customer by taking account of allergens, dietary requirements or medical considerations
- K17 How to prioritise or re-prioritise work allocations according to resource availability
- K18 How to deal with short-staffing
- K19 How changes to work allocations can impact on cost, deadlines and smooth working

# PPL 4KM35(SQA Unit Code-H2YW 04)

Manage a team to prepare, cook and present food to organisational standards

---

## Scope/range

- 1 Instructions**
  - 1.1 written
  - 1.2 verbal
  - 1.3 pictorial
  
- 2 Resources**
  - 2.1 equipment
  - 2.2 food and other supplies
  - 2.3 power
  - 2.4 staff
  - 2.5 time
  
- 3 Staff needs**
  - 3.1 cultural
  - 3.2 religious
  - 3.3 medical
  
- 4 Procedures for**
  - 4.1 ordering
  - 4.2 storage
  - 4.3 presentation
  - 4.4 portion control
  - 4.5 receipt of supplies
  - 4.6 preparation
  - 4.7 production
  - 4.8 heating / re-heating
  - 4.9 distribution
  - 4.10 waste disposal

## PPL 4KM35(SQA Unit Code-H2YW 04)

Manage a team to prepare, cook and present food to organisational standards

---

### Glossary

#### Suppliers of:

**produce** - local suppliers; central supply networks; fresh supplies, frozen supplies

**equipment** - kitchen - large/small, crockery/serving dishes

#### Style of service

Contract food service, quick service, fine dining

## **PPL 4KM35(SQA Unit Code-H2YW 04)**

Manage a team to prepare, cook and present food to organisational standards

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**Developed by** People 1st

---

**Version number** 1

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**Originating organisation** People 1st

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**Original URN** PPL 4KM35

---

**Relevant occupations** Kitchen Manager; Head Chef; Executive Chef; Development Chef

---

**Suite** Hospitality Management

---

**Key words** Manage staff; food preparation; food production; cooking; standards

## PPL 4KM36(SQA Unit Code-H2YX 04)

Keep up to date with current industry and food trends



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### Overview

This standard represents the requirement for the person in charge of a kitchen or food production area to lead the team to produce new and innovative dishes, menus and operational methods by keeping up with trends and innovations. This needs to be done within the context of the organisation's resource constraints, and business objectives.

# PPL 4KM36(SQA Unit Code-H2YX 04)

## Keep up to date with current industry food trends

---

### Performance criteria

#### Investigate current industry and food preparation and production trends

*You must be able to:*

- P1 Research a range of specialist hospitality and catering publications, equipment publications, websites, and publications on changing techniques and practices
- P2 Attend relevant industry events, to establish developments and innovations
- P3 Input to relevant events and educational activities to impart knowledge and exchange information
- P4 Keep up to date with customer feedback and preferences
- P5 Keep abreast of changes in wider social trends, the economic climate, environmental issues, health issues, political and technological developments
- P6 Experiment with the development of new dishes and recipes
- P7 Examine and analyse different agricultural and livestock production methods and their influence on food preparation and production
- P8 Keep up to date with different research and design innovations for ingredient developments and their impact on improved or faster food preparation

#### Apply new methods to food preparation and production within the organisation's constraints

*You must be able to:*

- P9 Introduce new equipment and processes and train staff to use them
- P10 Ensure staff are up to date on current principles of diet, nutrition and the control of allergens
- P11 Train staff in the development of cooking methods using modern techniques and basic foods to improve their skills
- P12 Introduce new kitchen protocols as appropriate
- P13 Train staff in new trends in different services, styles and presentations
- P14 Apply new techniques in the context of sustainability, carbon foot print and resources considerations
- P15 Implement appropriate waste management strategies
- P16 Apply different methods within budgetary constraints, resources, time, and the organisation's objectives

# PPL 4KM36(SQA Unit Code-H2YX 04)

## Keep up to date with current industry food trends

---

### Knowledge and understanding

#### Investigate current industry and food preparation and production trends

*You need to know and understand:*

- K1 The organisation's policy with regards to new innovations and budgetary constraints
- K2 Differences in locally versus centrally sourced produce
- K3 The range of different suppliers of produce and equipment and their differences
- K4 Effective budgetary control when using different type of produce and the impact on the business profitability
- K5 The contribution of the culinary impact on the success of the business
- K6 The physical management of the kitchen environment for optimum return, and the risk assessment of introducing new equipment or tools
- K7 The role of professional and trade or award/merit bodies

#### Apply new methods to food preparation and production within the organisation's consultants

*You need to know and understand:*

- K8 Food science
- K9 Gastronomic principles
- K10 Contemporary approaches to team working and development
- K11 How contractual arrangements can impact on the potential for change
- K12 The logistical implications of applying new methods in the food preparation and production areas
- K13 Why staff training is important to the implementation of new developments
- K14 How new innovations and techniques may impact on regular day to day business activities
- K15 The evolution and development of cooking methods
- K16 Different waste management and recycling practices

# PPL 4KM36(SQA Unit Code-H2YX 04)

Keep up to date with current industry food trends

---

## Scope/range

### 1 Relevant industry events

- 1.1 other establishments e.g. special functions, openings or social occasions
- 1.2 exhibitions
- 1.3 conferences
- 1.4 competitions
- 1.5 functions



# PPL 4KM36(SQA Unit Code-H2YX 04)

Keep up to date with current industry food trends

---

## Glossary

### **Food science**

Food-related chemistry; food-related biology; molecular structures of food;  
The impact of the preparation and production process

### **Gastronomy**

Discovery, tasting, experiencing, researching, and understanding about food,  
culture art and science of food

## PPL 4KM36(SQA Unit Code-H2YX 04)

Keep up to date with current industry food trends

---

**Developed by** People 1st

---

**Version number** 1

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---

**Status** Original

---

**Originating organisation** People 1st

---

**Original URN** PPL 4KM36

---

**Relevant occupations** Kitchen Manager; Head Chef; Executive Chef; Development Chef

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**Suite** Hospitality Management

---

**Key words** Gastronomy; technological advancements; innovations; science of cooking

---

### Overview

This standard covers the input to the design and development of kitchen areas by the person in charge of a commercial kitchen. The design should ensure the smooth flowing of staff, processes and activities around the kitchen, as well as the effective utilisation of equipment and produce.

# PPL 4KM37(SQA Unit Code-H2YY 04)

## Plan and design operational areas

---

### Performance criteria

#### Evaluate and plan future needs of the food preparation and production areas

*You must be able to:*

- P1 Establish the disadvantages of current food preparation and production areas
- P2 Assess the need for new types and functions of equipment in the light of future operational requirements
- P3 Carry out risk assessments of current food preparation and production areas
- P4 Carry out feasibility studies and cost analysis of possible options, and assess budget requirements
- P5 Review the impact of current and future legislation requirements on the preparation and production of food
- P6 Input into the development of proposals for kitchen design and layout in conjunction with relevant specialists
- P7 Gain approval for design proposals from appropriate people
- P8 Modify and amend plans according to feedback received

#### Input into the re-design of the food preparation and production area

*You must be able to:*

- P9 Analyse the impact of new equipment and tools
- P10 Assess new equipment and its possible applications
- P11 Plan the positioning of large equipment to optimise workflow, improve energy use, and safety procedures
- P12 Ensure that equipment is located to assist cleaning, maintenance and safety
- P13 Help to modify the design and layout and alter the budget appropriately
- P14 Ensure that the design and layout conforms with all relevant legislation
- P15 Ensure that all services and power supplies are functional
- P16 Ensure that ancillary areas are accounted for

# PPL 4KM37(SQA Unit Code-H2YY 04)

## Plan and design operational areas

---

### Knowledge and understanding

*You need to know and understand:*

#### Evaluate and plan future needs of the food production areas

- K1 Why organisational objectives need to be taken into account when planning new styles of operation in the food production areas
- K2 Timelines and deadlines that need to be met
- K3 Techniques to assess future requirements
- K4 How to cost proposed options
- K5 How to assess the suitability of proposed options
- K6 Who to consult with in the organisation to gain approval for proposals
- K7 The legislation relevant to the areas being designed
- K8 Where to gain information on current and future legislation

#### Input into the redesign of the food preparation and production area

*You need to know and understand:*

- K9 The impact of changes on inter-departmental working
- K10 The difference the changes will make to operational activities
- K11 How to assess the current and future uses of equipment
- K12 How to assess equipment specifications
- K13 What to include in a design specification
- K14 Where to get information on potential equipment
- K15 What legislation is relevant to the safe working of a redesigned food production area

# PPL 4KM37(SQA Unit Code-H2YY 04)

## Plan and design operational areas

---

### Scope/range

- 1 Relevant specialists**
  - 1.1 architects
  - 1.2 kitchen planners
  - 1.3 designers
  - 1.4 equipment manufacturers and suppliers
  
- 2 Equipment**
  - 2.1 food storage
  - 2.2 food preparation
  - 2.3 cooking
  - 2.4 serving
  - 2.5 surfaces
  
- 3 Services**
  - 3.1 gas
  - 3.2 electrical
  - 3.3 water
  - 3.4 supplies
  - 3.5 drainage
  - 3.6 ventilation
  - 3.7 lighting
  
- 4 Ancillary areas**
  - 4.1 pot washing
  - 4.2 dishwashing
  - 4.3 still areas
  - 4.4 cleaning and disinfections
  - 4.5 sanitary conveniences and cloakrooms
  - 4.6 waste disposal
  - 4.7 offices
  - 4.8 storage areas
  - 4.9 serving areas
  - 4.10 delivery areas and loading bays

# PPL 4KM37(SQA Unit Code-H2YY 04)

## Plan and design operational areas

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<b>Developed by</b>	People 1st
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<b>Version number</b>	1
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<b>Date approved</b>	October 2011
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<b>Indicative review date</b>	October 2015
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<b>Validity</b>	Current
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<b>Status</b>	Original
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<b>Originating organisation</b>	People 1st
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<b>Original URN</b>	PPL 4KM37
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<b>Relevant occupations</b>	Kitchen Manager; Head Chef; Executive Chef; Development Chef
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<b>Suite</b>	Hospitality Management
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<b>Key words</b>	Plan; design; operational areas; evaluate; kitchen; equipment; services; utilities
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# PPL 4FOH41(SQA Unit Code-H300 04)

## Manage customer profiles and recognition



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### Overview

This standard concerns the effective use of customer information to ensure that data is used to the benefit of the organisation while meeting customers' needs. Customers should feel welcome and special by being recognised, and their likes and dislikes used for future marketing as well as the provision of good customer service. Customers' data should also be protected and dealt with according to relevant legislation.



# PPL 4FOH41(SQA Unit Code-H300 04)

## Manage customer profiles and recognition

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### Performance criteria

#### Manage customer profile information

*You must be able to:*

- P1 Put procedures and systems in place to collect, capture and maintain customer records and profiles securely, and protect them from threats
- P2 Ensure that customer information is kept and used in line with current legislation
- P3 Oversee the appropriate use of customer information and profiles
- P4 Develop customer profiles using current information
- P5 Develop customer-focused information systems for gaining customer data for different types of customers

#### Use customer profile information to provide good customer service

*You must be able to:*

- P6 Profile your existing customer base
- P7 Provide an enhanced customer experience and excellent customer service based on customer profiles
- P8 Identify why customers use your products/services compared to competitors
- P9 Identify and assess threats and weaknesses in your organisation's services
- P10 Provide customer information profiles to other colleagues
- P11 Train staff in data protection and appropriate use of customer data

#### Forecast future trends using customer profiles

*You must be able to:*

- P12 Identify and assess current and future developments in your sector, including competitor activities
- P13 Identify and assess opportunities to expand into new markets and for innovations that meet customer needs
- P14 Forecast future target markets using data available from existing customer profiles

# PPL 4FOH41(SQA Unit Code-H300 04)

## Manage customer profiles and recognition

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### Knowledge and understanding

*You need to know and understand:*

#### Manage customer profile information

- K1 Current legislation and ethical considerations to do with collecting, holding and sharing customer information
- K2 Security risks and threats to customer information and profiles
- K3 Risk management methods and procedures
- K4 Why it is important to learn about customers and profile them correctly
- K5 Methods of getting customer feedback, and the costs and benefits of these
- K6 How software products can help collect and analyse information
- K7 The importance of checking users' understanding of the process of collecting information and their role in doing so
- K8 The principles of market segmentation

#### Use customer profile information to provide good customer service

*You need to know and understand:*

- K9 How to assess suitable sources of information about your customers
- K10 How to analyse, measure, and assess data and turn it into useful information for the business
- K11 Why it is important all staff are up to date on correct customer data usage
- K12 Best practice for customer service
- K13 Strengths and weaknesses of competitors
- K14 The organisation's business objectives and vision

#### Forecast future trends using customer profiles

*You need to know and understand:*

- K15 The sector and market in which the organisation operates
- K16 Sources of specific information about the market and the customers
- K17 The organisation's products services, available technologies and processes
- K18 Opportunities for collecting existing and new information about the market and customers

# PPL 4FOH41(SQA Unit Code-H300 04)

## Manage customer profiles and recognition

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### Scope/range

- 1 Customer information**
  - 1.1 personal and contact details
  - 1.2 past and current bills/accounts
  - 1.3 usage of services
  - 1.4 personal preferences
  - 1.5 frequency of custom
  
- 2 Profile**
  - 2.1 demographics
  - 2.2 age
  - 2.3 gender
  - 2.4 location of origin
  - 2.5 spend per head
  - 2.6 spend per year
  - 2.7 business/leisure customers

# PPL 4FOH41(SQA Unit Code-H300 04)

## Manage customer profiles and recognition

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### Glossary

#### **Current legislation**

Data Protection Act

#### **Threats to information**

IT, viruses, computer misuse/hacking, theft, data loss/back up protection, remote working and data security, information leaks

#### **Procedures and systems**

IT systems, arrival and departure data, financial information, billing information capture, software allowing convergence of information

## PPL 4FOH41(SQA Unit Code-H300 04)

### Manage customer profiles and recognition

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**Developed by** People 1st

---

**Version number** 1

---

**Date approved** October 2011

---

**Indicative review date** October 2015

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**Validity** Current

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**Status** Original

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**Originating organisation** People 1st

---

**Original URN** PPL 4FOH41

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**Relevant occupations** Front Office Manager; Front of House Manager; Reception Manager

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**Suite** Hospitality Management

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**Key words** Data capture; customer information; customer profiles; future trends

## PPL 4FOH42(SQA Unit Code-H301 04)

Ensure statutory fire and other security procedures are in place and followed (team and whole establishment)



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### Overview

This standard is about making sure the procedures are in place in the area of work for which you are responsible to make sure that all legislative and organisational arrangements are complied with. Furthermore, within the Front of House section there is a wider responsibility to ensure security and safety of the whole establishment as the initial entry point for the premises. The responsibility for this lies with all staff within the organisation, but the main responsibility at the main entry for the building lies with the Front of House Manager or Head of Department.

## PPL 4FOH42(SQA Unit Code-H301 04)

Ensure statutory fire and other security procedures are in place and followed (team and whole establishment)

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### Performance criteria

#### Implement and maintain statutory fire and security procedures

*You must be able to:*

- P1 Establish regular monitoring and review schedules to ensure procedures are being followed
- P2 Review procedures regularly to ensure they are up to date
- P3 Introduce new updated procedures as and when required after review
- P4 Introduce changes to working practices to fit in with procedures as appropriate
- P5 Ensure that procedures devised cover all aspects of operations, such as normal everyday business, emergencies and unusual occurrences
- P6 Ensure all staff know the procedures in place and their roles as necessary
- P7 Train staff to identify and report actual and potential issues
- P8 Train staff to comply with relevant legislation
- P9 Carry out risk assessments to identify hazards and potential hazards
- P10 Carry out regular inspections to ensure all compliance issues are being met
- P11 Record all hazards or problems identified and take action to rectify them
- P12 Maintain contact with relevant inspection agencies and authorities as necessary
- P13 Ensure all staff have regular training to deal with emergencies, or out of the ordinary situations.
- P14 Make sure that the department has the resources necessary to be compliant
- P15 Ensure administrative systems are in place to record events to be dealt with
- P16 Take steps to deal with failures in compliance
- P17 Seek expert advice where necessary either within or outside the organisation
- P18 Report faulty equipment or problems in the area to the relevant person

## PPL 4FOH42(SQA Unit Code-H301 04)

Ensure statutory fire and other security procedures are in place and followed (team and whole establishment)

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### Knowledge and understanding

*You need to know and understand:*

### Implement and maintain statutory fire and security procedures

- K1 The relevant legislation, regulations and codes of practice
- K2 Company procedures to deal with specific circumstances
- K3 The importance of ensuring that correct procedures are in place to monitor safety and security, and the potential impact of not doing so on the business
- K4 The implications of breaking the law for you, your staff and the organisation
- K5 How to carry out risk assessments
- K6 How to assess the need for equipment required
- K7 How to record and report information
- K8 Why feedback from staff and customers is important and how it can be used
- K9 The responsibilities of each member of staff regarding safety and security
- K10 The organisation's policy for reporting hazards
- K11 Which records need to be monitored regularly and why
- K12 Where to obtain current legal information
- K13 What to do if there is conflict between statutory and organisational requirements
- K14 How to monitor activities against procedures
- K15 Standard check in procedures for guests who need specific assistance in case of evacuation



## PPL 4FOH42(SQA Unit Code-H301 04)

Ensure statutory fire and other security procedures are in place and followed (team and whole establishment)

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### Scope/range

#### 1 Records

- 1.1 accident records
- 1.2 maintenance records
- 1.3 fire records
- 1.4 HACCP
- 1.5 RIDDOR

#### 2 Area of work

- 2.1 front of house
- 2.2 stock rooms
- 2.3 offices
- 2.4 public areas
- 2.5 staff rooms
- 2.6 back of house
- 2.7 meeting rooms

#### 3 Staff

- 3.1 outside contractors
- 3.2 in house staff (permanent)
- 3.3 temporary staff
- 3.4 agency staff

## **PPL 4FOH42(SQA Unit Code-H301 04)**

Ensure statutory fire and other security procedures are in place and followed (team and whole establishment)

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### **Glossary**

#### **Relevant legislation**

HASWA, COSHH, RIDDOR, DDA, Fire Regulations

#### **Relevant inspection agencies and authorities**

Health and Safety Executive, Local Authority, Building Control, Enforcement officer, Fire Service/Officer, Statutory Bodies

#### **Responsibilities**

Risk assessment, Fire certificates, public liability insurance, PAT testing, fire alarm testing

## PPL 4FOH42(SQA Unit Code-H301 04)

Ensure statutory fire and other security procedures are in place and followed (team and whole establishment)

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**Developed by** People 1st

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**Version number** 1

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**Date approved** October 2011

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**Indicative review date** October 2015

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**Validity** Current

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**Status** Original

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**Originating organisation** People 1st

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**Original URN** PPL 4FOH42

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**Relevant occupations** Front Office Manager; Front of House Manager; Reception Manager

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**Suite** Hospitality Management

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**Key words** Fire safety; security; legislation; compliance; procedures; risk assessment; inspection; hazard

## PPL 4FOH43(SQA Unit Code-H302 04)

Manage arrivals and departures to deliver and maximise revenue potential



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### Overview

This standard is about the efficient and effective management of guest movement in line with room availability. It involves ensuring that liaison with relevant departments takes place and records are up to date to ensure that rooms are let out at the appropriate rate to achieve maximum revenue targets.

## PPL 4FOH43(SQA Unit Code-H302 04)

### Manage arrivals and departures to deliver and maximise revenue potential

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#### Performance criteria

#### Manage procedures for guest arrivals and departures

*You must be able to:*

- P1 Make sure that front office staff adhere to the organisation's room rates and tariffs strategy
- P2 Implement systems to set and manage room sales targets and incentivise staff
- P3 Ensure promotion and marketing packages are in place and offered appropriately by staff
- P4 Ensure that staff are trained in the processes for guest arrivals and departures
- P5 Design and implement easy to use check in and check out procedures to help with customer flow and enhance customer satisfaction
- P6 Make sure that the reception and all public areas are kept at the appropriate standard according to the organisation's policies
- P7 Maintain regular contact with other relevant departments
- P8 Implement procedures to regularly check room stocks with appropriate departments
- P9 Ensure reservations processes and procedures run smoothly
- P10 Ensure that staff are aware of open and close figures, yield management and latest set rates.
- P11 Brief staff on different methods and procedures for recording details of advance reservations, the sources of reservations, and their confirmation

#### Maximise revenue potential

*You must be able to:*

- P12 Make sure all staff use appropriate techniques to sell products and services available, and are adequately trained
- P13 Make sure that staff are able to identify the range of selling opportunities available
- P14 Enable staff to sell rooms at the most appropriate rate to meet commercial objectives
- P15 Make sure electronic and filing systems are in place and are adequate to record information correctly
- P16 Meet maximum room occupancy and revenue targets, average daily rate against 'par revenue' targets and year-on-year targets, where these are used in the organisation
- P17 Set up arrangements and promotions to optimise relationships with relevant reservations sources
- P18 Ensure that accounting and guest payment procedures are up to date and operate effectively to maximise revenue income

## **PPL 4FOH43(SQA Unit Code-H302 04)**

### **Manage arrivals and departures to deliver and maximise revenue potential**

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- P19 Ensure that staff are aware and up to date on room availability and status, and allocate the most appropriate rooms according to customer need
- P20 Ensure staff are knowledgeable on the products and services on offer

## PPL 4FOH43(SQA Unit Code-H302 04)

### Manage arrivals and departures to deliver and maximise revenue potential

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#### Knowledge and understanding

*You need to know and understand:*

#### Manage procedures for guest arrivals and departures

- K1 Company policy on room rates / tariffs
- K2 The different sources of advanced and ad-hoc reservations
- K3 Company revenue targets
- K4 The different promotions and marketing approaches to increase business
- K5 Front office procedures for advanced or ad-hoc reservations
- K6 The range of departments to be dealt with and why good communication maximises revenue and improves customer service
- K7 How to communicate relevant information to staff

#### Maximise revenue potential

*You need to know and understand:*

- K8 Appropriate selling techniques and communicating them to staff
- K9 How to measure performance against organisational standards
- K10 How to write and convey procedures and work instructions
- K11 The different hotel operating systems available, the data they provide and how it can be used to maximise sales.
- K12 KPIs - Par revenue per room, average daily rate, occupancy targets, weekly yield targets, year-on-year targets

# PPL 4FOH43(SQA Unit Code-H302 04)

## Manage arrivals and departures to deliver and maximise revenue potential

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### Scope/range

- 1 Relevant departments**
  - 1.1 housekeeping/accommodation
  - 1.2 conference/events
  - 1.3 function rooms
  - 1.4 maintenance
  - 1.5 F&B/room service/kitchen
  - 1.6 sales
  - 1.7 reservations
  - 1.8 revenue
  
- 2 Reservation sources**
  - 2.1 individuals
  - 2.2 travel agents
  - 2.3 tour operators
  - 2.4 businesses/companies
  - 2.5 central reservations
  - 2.6 airlines
  - 2.7 conference organisers
  
- 3 Tariffs/Rates**
  - 3.1 room only
  - 3.2 room and breakfast
  - 3.3 half board
  - 3.4 full board
  - 3.5 long lets
  - 3.6 special packages



## **PPL 4FOH43(SQA Unit Code-H302 04)**

Manage arrivals and departures to deliver and maximise revenue potential

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### **Glossary**

#### **Hotel reservation systems**

For example – Opera, Fidelio, Protel

## **PPL 4FOH43(SQA Unit Code-H302 04)**

Manage arrivals and departures to deliver and maximise revenue potential

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**Developed by** People 1st

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**Version number** 1

---

**Date approved** October 2011

---

**Indicative review date** October 2015

---

**Validity** Current

---

**Status** Original

---

**Originating organisation** People 1st

---

**Original URN** PPL 4FOH43

---

**Relevant occupations** Front Office Manager; Front of House Manager; Reception Manager

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**Suite** Hospitality Management

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**Key words** Revenue; maximise; arrivals; departures; rooms; reservations

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## PPL 4FOH44(SQA Unit Code-H303 04)

### Manage accurate and appropriate billing and payment processes



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#### Overview

This standard is about good payment and credit control procedures to not only maintain business cash flow, but to also maintain customer satisfaction. It covers the need to ensure that systems are in place to receive monitor, secure and tally payments received with the relevant documentation, and ensure that records and accounts are up to date and conform to good practice. It provides another means of checking that bookings and sales of products and services are confirmed, and all departments operate collaboratively.

# PPL 4FOH44(SQA Unit Code-H303 04)

## Manage accurate and appropriate billing and payment processes

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### Performance criteria

#### Monitor and evaluate payment handling systems

*You must be able to:*

- P1 Ensure that systems are in place to fully train staff and instruct them in the operation of payment handling system and procedures
- P2 Monitor systems and procedures to make sure that they are followed in line with organisational policy
- P3 Support staff if they need clarification of systems and procedures, or if they are having problems when dealing with payments
- P4 Monitor the use of systems and procedures and make sure they are being followed
- P5 Monitor feedback from staff and customers regarding systems and procedures
- P6 Propose new methods and systems for dealing with payments in keeping with organisational requirements and in the light of feedback
- P7 Make sure staff handle payments according to the organisation's policy, and that payments and refunds are correctly authorised
- P8 Reconcile actual takings against recorded takings and follow the organisation's procedures and legal requirements to deal with any discrepancy
- P9 Monitor payments and ensure data on discounts and promotions is up to date
- P10 Complete all documents relating to takings, and process in line with your organisation's procedures
- P11 Take effective action to manage problems that may disrupt the service when they occur
- P12 Ensure that billing systems in use are appropriate to the organisation's requirements and recommend alternatives as appropriate

#### Maintain the security of payment handling systems

*You must be able to:*

- P13 Make sure staff are able to identify possible fraudulent transactions and breaches of security and know what action to take
- P14 Set up and manage secure payment point procedures
- P15 Authorise the collection of payment point contents following your organisation's procedures
- P16 Investigate payment discrepancies and take prompt action to remedy them, taking into account customer service guidelines and confidentiality requirements
- P17 Monitor staff to ensure security procedures are being followed
- P18 Make sure deviations from security procedures are identified through monitoring
- P19 Investigate breaches of security fully and take appropriate action

# PPL 4FOH44(SQA Unit Code-H303 04)

## Manage accurate and appropriate billing and payment processes

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### Knowledge and understanding

*You need to know and understand:*

#### Monitor and evaluate payment handling systems

- K1 What the organisation's procedures are for handling payments
- K2 The different roles and responsibilities of staff when handling payments and collecting takings
- K3 How to communicate to staff the handling of payments, the range of the organisation's services, and discounts and promotions that may apply
- K4 What the channels of communication are for feedback
- K5 What action to take when standards are not achieved
- K6 How to monitor organisational procedures
- K7 What IT systems and packages are appropriate for effective payment handling within the context of the organisation's policies
- K8 How to access budget to manage the organisation's payment handling procedures
- K9 The legislation relevant to payment handling
- K10 Techniques to monitor, evaluate, and review the payment handling process
- K11 How to deal with problems identified

#### Maintain the security of payment handling systems

*You need to know and understand:*

- K12 How to plan and implement the security of staff and receipts and what are potential threats to safety
- K13 How to deal with suspected dishonesty in the organisation
- K14 How security issues can be identified and what they are
- K15 How to communicate the importance of security to staff
- K16 Corrective action to deal with breaches in security
- K17 What contingency plans can be devised and implemented to reduce the impact of security breaches
- K18 The organisation's legal position regarding security breaches
- K19 The organisation's policy and procedures on refunds

# PPL 4FOH44(SQA Unit Code-H303 04)

## Manage accurate and appropriate billing and payment processes

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### Scope/range

- 1 Payment systems**
  - 1.1 credit/debit cards
  - 1.2 cheques
  - 1.3 credit notes
  - 1.4 discounts
  - 1.5 travellers cheques
  - 1.6 vouchers
  - 1.7 cash
  - 1.8 account billing
  - 1.9 virtual credit cards/cards not present
  - 1.10 invoicing
  - 1.11 BACS
  
- 2 Staff**
  - 2.1 permanent FOH staff
  - 2.2 temporary FOH staff
  - 2.3 staff in other departments
  - 2.4 senior staff
  
- 3 Organisational requirements relating to**
  - 3.1 speed of processing
  - 3.2 security measures
  - 3.3 recording of payments
  - 3.4 customer service
  - 3.5 passing of payments to accounts
  - 3.6 weekend/evening working
  
- 4 Security procedures**
  - 4.1 in advance / on deposit payments
  - 4.2 cash levels in till / on premises
  - 4.3 bank transfers
  - 4.4 handling and processing payments
  - 4.5 credit/debit card protection

## **PPL 4FOH44(SQA Unit Code-H303 04)**

Manage accurate and appropriate billing and payment processes

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### **Glossary**

#### **Payment points**

e.g. EPOS systems

## PPL 4FOH44(SQA Unit Code-H303 04)

Manage accurate and appropriate billing and payment processes

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**Developed by** People 1st

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**Version number** 1

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**Date approved** October 2011

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**Indicative review date** October 2015

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**Validity** Current

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**Status** Original

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**Originating organisation** People 1st

---

**Original URN** PPL 4FOH44

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**Relevant occupations** Front Office Manager; Front of House Manager; Reception Manager

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**Suite** Hospitality Management

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**Key words** Billing; payment; processes; reconciling payments; security



# PPL 4FOH45(SQA Unit Code-H304 04)

## Manage front of house and guest relation services



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### Overview

This standard concerns the management of all other front of house functions relevant to the well-being of customers. The standard also covers the other services that assist with enhancing the customer experience that are additional to accommodation and food and beverage provision.

# PPL 4FOH45(SQA Unit Code-H304 04)

## Manage front of house and guest relation services

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### Performance criteria

#### Manage concierge, porters and night teams

*You must be able to:*

- P1 Ensure policies and procedures for front of house support are in place and implemented
- P2 Ensure provision is made to supply local and other guest information
- P3 Make space in the lobby area for information materials for guests to be displayed, according to your organisation's policy
- P4 Put training arrangements in place to ensure that front of house staff appearance and behaviour meets organisational standards
- P5 Make sure that organisational standards are communicated to front of house staff, and that they understand the importance of appropriate behaviour and appearance
- P6 Carry out daily checks and monitor the appearance of the front of house areas
- P7 Make sure procedures are in place to manage the receipt and secure storage of guest property
- P8 Provide secure areas for guest property
- P9 Provide staff training for receipt, storage, handling and securing of guest property
- P10 Put in place a monitoring system to ensure guests' property handling is carried out correctly (recording, receipt, information maintenance and retrieval)
- P11 Ensure front of house signage and directions to other areas of the hotel, events and activities is kept up to date and looks appropriate
- P12 Ensure security systems are in place and operate effectively
- P13 Ensure that customer requests, queries, complaints and feedback are managed effectively
- P14 Ensure good working relationships with external establishments your customers may wish to use
- P15 Ensure customer access to the building at all times according to your organisation's policy

#### Manage guest relation services

*You must be able to:*

- P16 Ensure all staff are fully aware of services and products available within the establishment and communicate information to customers
- P17 Put systems in place to meet customer needs promptly
- P18 Ensure that all staff know what to do in both an emergency or unusual situation, and generally to meet customers' everyday needs
- P19 Establish good working relationships with internal departments to ensure customer needs are met efficiently
- P20 Plan for the different needs of a range of customers and protect the organisation against potential litigation

# PPL 4FOH45(SQA Unit Code-H304 04)

## Manage front of house and guest relation services

---

### Knowledge and understanding

*You need to know and understand:*

#### Manage concierge, porters and night teams

- K1 Security procedures and potential threats to establishment or guests
- K2 Local and internal services and how these may be used to enhance customers' experience of your establishment
- K3 The importance of good appearance of the front of house
- K4 How to implement legislation, fire, health and safety and security requirements
- K5 How to communicate and train staff to follow procedures
- K6 Employer and customer liability and your responsibilities relating to these
- K7 How to write procedures and work instructions
- K8 How to make and implement contingency plans
- K9 How to assess staff performance and the status of front of house area

#### Manage guest relation services

*You need to know and understand:*

- K10 How to minimise disruption to customer service when problems occur
- K11 The full range of products and services available in your establishment
- K12 How to anticipate and meet customer needs
- K13 How to identify and evaluate possible solutions to problems
- K14 The resources available to you to carry out your responsibilities
- K15 What to do in an emergency, or in the event of a security problem
- K16 Relevant developments in cultural and social awareness and how they may impact on service

# PPL 4FOH45(SQA Unit Code-H304 04)

## Manage front of house and guest relation services

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### Scope/range

- 1 Front of House support**
  - 1.1 porterage and luggage service
  - 1.2 concierge and night teams
  
- 2 Local and other guest information**
  - 2.1 visitor attractions
  - 2.2 transport services
  - 2.3 restaurants
  - 2.4 theatres
  - 2.5 cinemas
  - 2.6 local services/shops
  
- 3 Guest property**
  - 3.1 luggage
  - 3.2 valuables
  - 3.3 important documents
  - 3.4 messages by fax, telephone, email
  
- 4 Secure areas**
  - 4.1 left luggage areas
  - 4.2 safety deposit boxes
  - 4.3 safes
  - 4.4 message holding
  - 4.5 electronic communications storage
  
- 5 Security systems**
  - 5.1 CCTV
  - 5.2 suspicious package procedures
  - 5.3 security personnel
  
- 6 External establishments**
  - 6.1 theatres
  - 6.2 restaurants
  - 6.3 travel agents
  - 6.4 booking agencies
  - 6.5 public houses
  
- 7 Services and products**
  - 7.1 spa and/or gym facilities
  - 7.2 restaurants
  - 7.3 conferences
  - 7.4 shopping

# PPL 4FOH45(SQA Unit Code-H304 04)

## Manage front of house and guest relation services

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### **8 Emergency or unusual situations requiring**

- 8.1 medical assistance
- 8.2 first aid
- 8.3 police assistance
- 8.4 fire brigade
- 8.5 locksmith

### **9 Everyday needs**

- 9.1 sewing kit
- 9.2 shoe polish
- 9.3 laundry facilities
- 9.4 repair of room facilities

### **10 Different customer needs**

- 10.1 cultural differences
- 10.2 service requirements
- 10.3 disability awareness
- 10.4 booking policies according to gender/orientation

# PPL 4FOH45(SQA Unit Code-H304 04)

## Manage front of house and guest relation services

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**Developed by** People 1st

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**Version number** 1

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**Date approved** October 2011

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**Indicative review date** October 2015

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**Validity** Current

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**Status** Original

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**Originating organisation** People 1st

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**Original URN** PPL 4FOH45

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**Relevant occupations** Front Office Manager; Front of House Manager; Reception Manager

---

**Suite** Hospitality Management

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**Key words** Porters; concierge; luggage; guest relations; security; emergencies

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### Overview

This standard concerns the effective management of a reservation section within an organisation to not only provide good service to customers making reservations, but also to ensure efficient movement of space and services at the required rates. This could include a centralised or localised reservation service in a range of different kinds of organisations.

# PPL 4FOH46(SQA Unit Code-H305 04)

## Manage reservations systems

---

### Performance criteria

*You must be able to:*

- P1 Ensure procedures and systems are in place to capture all reservations and booking information
- P2 Ensure reservations staff co-ordinate reservation data, integrate this data and channel information as appropriate
- P3 Put systems in place to manage and record all booking channels offered by the organisation and used by customers
- P4 Ensure room inventory is maintained
- P5 Ensure reservations staff are trained in and aware of, product/service rates, weekend deals, special arrangements, promotions and discounts
- P6 Ensure staff deal with guest information and histories according to current legislation
- P7 Ensure deposit and cancellation policies are operated and known by staff where appropriate
- P8 Manage and interpret sales reports and reservations information, and ensure relevant data is kept up to date
- P9 Ensure room rates and availability data is kept up to date
- P10 Regularly monitor charges on booking systems arrangements with outside agencies
- P11 Ensure reservations are handled in line with the organisation's objectives, policies, and procedures
- P12 Ensure contingency plans are in place to minimise disruption if problems occur
- P13 Ensure staff know how to use booking and operating systems effectively
- P14 Ensure night audit and end of day procedures are carried out



# PPL 4FOH46(SQA Unit Code-H305 04)

## Manage reservations systems

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### Knowledge and understanding

*You need to know and understand:*

- K1 How different reservation systems work, and the most appropriate ones for your organisation
- K2 How best to work with the reservation systems currently in place
- K3 How to train staff on the use of reservation systems and the information they contain, and the importance of this
- K4 How to ensure staff are up to date with current rates, room availability, promotions, discounts
- K5 The importance of maintaining arrangements with various booking channels
- K6 The importance of data protection and other relevant legislation
- K7 How to monitor and analyse sales and staff performance
- K8 The organisation's objectives, policies and procedures
- K9 How to minimise disruption to service when problems occur
- K10 How to maintain efficient working relationships between front and back office staff
- K11 What booking and operating systems are available across the industry
- K12 The booking and operating system in use in your organisation
- K13 How to manage smooth but discrete shift handovers
- K14 Night audit and end of day procedures

# PPL 4FOH46(SQA Unit Code-H305 04)

## Manage reservations systems

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### Scope/range

- 1 Booking channels**
  - 1.1 online booking
  - 1.2 agents
  - 1.3 tour operators
  - 1.4 individuals
  - 1.5 global distribution systems
  
- 2 Reservation systems**
  - 2.1 bedroom booking
  - 2.2 conference booking
  - 2.3 table management
  - 2.4 function booking

# PPL 4FOH46(SQA Unit Code-H305 04)

## Manage reservations systems

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**Developed by** People 1st

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**Version number** 1

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**Date approved** October 2011

---

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**Validity** Current

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**Status** Original

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**Originating organisation** People 1st

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**Original URN** PPL 4FOH46

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**Relevant occupations** Front Office Manager; Front of House Manager; Reception Manager

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**Suite** Hospitality Management

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**Key words** Reservations; room; function; conference; table; booking, guests

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### Overview

This standard is about the implementation and management of housekeeping procedures to ensure the housekeeping team maintain organisational standards in public areas, guest rooms, conference rooms and offices – where applicable.

Procedures must be robust, in that they meet not only organisational but also regulatory requirements, in particular Health & Safety legislation. This may take the form of a service level agreement or similar quality standard within the organisation, which the housekeeping team will be expected to achieve.

This standard is likely to be suitable for Executive Housekeepers, Housekeeping Managers, or similar roles.

# PPL 4HK51(SQA Unit Code-H307 04)

## Implement and manage housekeeping procedures

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### Performance criteria

*You must be able to:*

#### Implement Housekeeping procedures

- P1 Establish a housekeeping service level agreement, in consultation with other departments, which meets organisational requirements
- P2 Ensure the housekeeping team is trained to meet organisational standards and regulatory requirements in the course of their duties
- P3 Develop contingency procedures to deal with any problems that may arise
- P4 Ensure operational procedures are presented clearly so that the housekeeping team can easily access them for reference
- P5 Implement an effective procedure for the procurement of housekeeping supplies, including linen
- P6 Implement a system which maintains appropriate par stock levels of housekeeping supplies, including linen
- P7 Develop safe procedures for the handling of contaminated linen and potentially hazardous objects
- P8 Develop your team's ability to adapt to different tasks, so that multi-tasking is possible

#### Manage housekeeping procedures to meet organisational standards and business needs

*You must be able to:*

- P9 Ensure systematic methods are in place for checking the work of the housekeeping team
- P10 Manage the housekeeping and availability of meeting and conference rooms in liaison with the relevant management colleague(s)
- P11 Manage the housekeeping and availability of guest rooms in liaison with the relevant management colleague(s)
- P12 Manage the cleaning of public areas within the limits of your responsibility
- P13 Benchmark the team's housekeeping performance levels against those of competitors, where this is appropriate and possible
- P14 Ensure activities required by regulation and legislation, are reviewed with your team on a regular basis
- P15 Intervene swiftly when housekeeping standards fall below that which is expected
- P16 Review expected usage of housekeeping supplies against actual usage
- P17 Report on the effectiveness of procedures and your team's performance to the senior management team

# PPL 4HK51(SQA Unit Code-H307 04)

## Implement and manage housekeeping procedures

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### Knowledge and understanding

*You need to know and understand:*

#### Implement Housekeeping procedures

- K1 Current organisational and regulatory requirements which affect the housekeeping service you can provide
- K2 How to create service level agreements
- K3 How to communicate effectively with a team from diverse backgrounds
- K4 How to develop clear plans and procedures across a variety of areas
- K5 Your organisation's guidelines which govern the procurement of supplies, and your personal limits within these
- K6 Par stock levels for your housekeeping supplies, and how to maintain these
- K7 Safe working practices for dealing with contaminated linen and potentially hazardous objects
- K8 Organisational requirements for room turnaround times, and how to plan your team's working patterns to meet these
- K9 Why housekeeping procedures must meet organisational needs in terms of room standards and availability
- K10 The latest developments in the housekeeping industry, including those relating to technology, health and safety, and employment practice, and how these may impact on the development of procedures
- K11 How to check your team's understanding of regulatory requirements, including Health & Safety and Food Safety

#### Manage housekeeping procedures to meet organisational standards and business needs

*You need to know and understand:*

- K12 How to ensure supervisory staff can conduct effective observation of housekeeping performance
- K13 How to monitor that the appropriate cleaning procedure and chemical(s) are used for every scenario encountered by the housekeeping team
- K14 How to conduct effective benchmarking
- K15 Realistic rooms-per-day targets you can set your team, which meet organisational needs
- K16 How to conduct reviews of housekeeping supply usage
- K17 How to identify key factors of your team's performance for discussion with the senior management team

# PPL 4HK51(SQA Unit Code-H307 04)

## Implement and manage housekeeping procedures

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### Scope/range

#### **1 Housekeeping procedures**

- 1.1 re-stocking
- 1.2 cleaning
- 1.3 linen service
- 1.4 fault reporting

#### **2 Public areas**

- 2.1 lobby
- 2.2 corridors
- 2.3 entrances
- 2.4 restaurants
- 2.5 bars
- 2.6 leisure facilities

## PPL 4HK51(SQA Unit Code-H307 04)

### Implement and manage housekeeping procedures

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<b>Developed by</b>	People 1st
<b>Version number</b>	1
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<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	People 1st
<b>Original URN</b>	PPL 4HK51
<b>Relevant occupations</b>	Accommodation Manager; Housekeeping Manager; Executive Housekeeper
<b>Suite</b>	Hospitality Management
<b>Key words</b>	Housekeeping; procedures; standards; linen; cleaning; manage; monitor

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## PPL 4HK52(SQA Unit Code-H309 04)

### Manage guest security and privacy in accordance with legislative and organisational procedures



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#### Overview

This standard is about ensuring that the housekeeping team keep guests' security and privacy at the top of their priorities.

Procedures must be robust, in that they meet not only organisational but also regulatory requirements. Guests expect their room to be as secure and private as their own home, and the housekeeping team has a key responsibility in ensuring this happens.

## PPL 4HK52(SQA Unit Code-H309 04)

### Manage guest security and privacy in accordance with legislative and organisational procedures

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#### Performance criteria

*You must be able to:*

- P1 Ensure potential housekeeping staff have thorough reference checks conducted prior to recruitment
- P2 Ensure that the team are trained on their responsibilities regarding guest belongings and data
- P3 Identify potential threats to guest security and develop procedures to tackle these
- P4 Ensure staff are trained to deal with increased levels of security and privacy when required
- P5 Monitor the housekeeping team's observation of organisational protocols regarding access to rooms for guests, contractors and any person(s) they do not know to be authorised to enter
- P6 Implement procedures to deal effectively but cautiously with lost property enquiries, which comply with relevant data protection legislation
- P7 Follow security and regulatory procedures when managing the disposal of lost property
- P8 Ensure the team do not leave rooms in a manner that could compromise guest security or privacy
- P9 Deal promptly with any issues regarding the secure storage of guest's high-value items, whether this is room safes, or alternative secure storage
- P10 Ensure your team respects the privacy of guests when seeking access to rooms
- P11 Respond and deal quickly with reported security or privacy breaches
- P12 Regularly monitor your staff's performance with regard to security and privacy procedures
- P13 Regularly review guest security and privacy at your team's meetings
- P14 Ensure all confidential data is disposed of in accordance with organisational and regulatory procedures

## PPL 4HK52(SQA Unit Code-H309 04)

### Manage guest security and privacy in accordance with legislative and organisational procedures

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#### Knowledge and understanding

*You need to know and understand:*

- K1 Your organisation's responsibilities to guests under the legislation governing their personal information
- K2 Organisational standards relating to guest security and privacy
- K3 What the biggest potential threats to guest security are within your organisation
- K4 The increased security measures and need for privacy that VIP guests may require
- K5 The limits of you and your team's responsibilities with regard to guest data and property
- K6 How to effectively conduct team training in the area of guest security and privacy
- K7 What procedures must be followed before returning lost property to guests
- K8 Organisational and legislative timelines and procedures for disposal of lost property
- K9 How to deal with issues relating to high-value guest items
- K10 The key people that must be contacted following breaches in guest security or privacy, and the actions which then need undertaking
- K11 Ways to ensure your team are regularly monitored for adherence to privacy and security procedures
- K12 Your organisation's procedures regarding key / door pass control
- K13 Organisational and regulatory procedures for disposal of confidential data

## **PPL 4HK52(SQA Unit Code-H309 04)**

Manage guest security and privacy in accordance with legislative and organisational procedures

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**Developed by** People 1st

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**Version number** 1

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**Date approved** October 2011

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**Validity** Current

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**Status** Original

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**Originating organisation** People 1st

---

**Original URN** PPL 4HK52

---

**Relevant occupations** Accommodation Manager; Housekeeping Manager; Executive Housekeeper

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**Suite** Hospitality Management

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**Key words** Guest; security; privacy; property; confidentiality

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## PPL 4HK53(SQA Unit Code-H30A 04)

### Manage room availability to maximise revenue potential



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#### Overview

This standard is for managers in housekeeping, for whom a key objective is keeping the availability of rooms as high as possible. 'Rooms' can include bedrooms, function rooms, meeting rooms and any other type of room which falls under the housekeeping team's remit.

This is done by managing the work of the housekeeping team in a way that complements business activity, and maximises the use of high-value accommodation wherever possible. You are likely to work closely with a Front of House manager or similar to help achieve this aim.

## PPL 4HK53(SQA Unit Code-H30A 04)

### Manage room availability to maximise revenue potential

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#### Performance criteria

*You must be able to:*

- P1 Develop an agreed standard for room 'turnaround' times, which is realistic with available resources and meets organisational requirements
- P2 Benchmark the team's average room 'turnaround' standard against recognised industry and/or organisational standards
- P3 Liaise with colleagues involved in reservation management to gauge room requirements, both on a daily basis and over the longer term
- P4 Develop contingency resourcing plans to deal with unexpected changes to anticipated business activity at short notice
- P5 Work closely with colleagues involved in reservation management to meet the particular needs of large group bookings
- P6 Ensure that allocated rooms take priority when managing room turnaround
- P7 Monitor the team's performance against room turnaround targets
- P8 Ensure that organisational standards are not compromised by tight turnaround deadlines
- P9 Manage the closure of rooms for essential maintenance in a way which minimises disruption to room availability
- P10 Monitor the levels of usage of housekeeping supplies, to ensure a lack of physical resources cannot affect room availability
- P11 Develop your team's flexibility, in order to meet changing demands according to business activity
- P12 Effectively manage the use of temporary staff, where this is the most appropriate way of meeting business demands
- P13 Analyse the team's performance in terms of rooms per day against the agreed standard
- P14 Report on the success of procedures and your team's performance against room targets to the senior management team

# PPL 4HK53(SQA Unit Code-H30A 04)

## Manage room availability to maximise revenue potential

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### Knowledge and understanding

*You need to know and understand:*

- K1 Current organisational and regulatory requirements which affect the housekeeping service you can provide
- K2 Industry practice and standards for the management of room availability
- K3 The impact of your budget on available resources, and how this influences turnaround time standards
- K4 How to benchmark the team's performance against that of your competitors
- K5 Organisational requirements for room 'turnaround' times, and how to plan the team's workloads to meet these without sacrificing room standards.
- K6 How the management of guest reservations relates to your role in managing room availability
- K7 Which rooms or suites generate higher profit margins for the business, if applicable
- K8 When it is appropriate to employ temporary staff, and the regulations which govern their employment
- K9 Why it is important that certain rooms take precedence for turnaround
- K10 How to manage the closure of rooms for essential maintenance in a way which minimises disruption to room availability
- K11 How the usage of housekeeping supplies can affect the ability to maximise room availability
- K12 How to identify key factors of your team's performance for discussion with the senior management team

## PPL 4HK53(SQA Unit Code-H30A 04)

### Manage room availability to maximise revenue potential

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<b>Developed by</b>	People 1st
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<b>Original URN</b>	PPL 4HK53
<b>Relevant occupations</b>	Accommodation Manager; Housekeeping Manager; Executive Housekeeper
<b>Suite</b>	Hospitality Management
<b>Key words</b>	Rooms; availability; turnaround times; housekeeping; staffing; resources

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## PPL 4HK54(SQA Unit Code-H30B 04)

### Liaise with others to manage maintenance and repair work



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#### Overview

This standard is for managers in hospitality who have some responsibility for the maintenance and repair of organisational property.

The work may be internal or external, in either public or private areas of the property.

You may be dealing with internal staff or external contractors, and the procedures used are likely to reflect that difference.

## PPL 4HK54(SQA Unit Code-H30B 04)

### Liaise with others to manage maintenance and repair work

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#### Performance criteria

*You must be able to:*

- P1 Implement a schedule to manage regular maintenance of guest rooms, aligning this to peaks and troughs of business activity
- P2 Liaise with other managers to ensure rooms closed for maintenance or repair do not impact on overall room availability or other business activity
- P3 Identify the roles of other staff in the organisation who have responsibility for property, maintenance and repair
- P4 Develop your team to identify maintenance and repair issues, and how they should prioritise these
- P5 Ensure that the team can differentiate between maintenance and condition issues
- P6 Develop a culture of energy-saving and recycling, in a way that reduces the need for maintenance and replacement
- P7 Ensure that the team can differentiate between minor issues they can deal with at the time, and other issues that require outside assistance
- P8 Intervene in urgent or emergency maintenance or repair issues, where this is impacting directly on current guests
- P9 Manage an effective system of fault notification, both between you and your team, and yourself and other managers responsible for maintenance and repair
- P10 Manage the effective monitoring of maintenance required by legislation
- P11 Recognise long-term maintenance issues which will require large-scale repair or replacement work, and raise these at management meetings
- P12 Assist as required in the management and operation of large-scale refurbishment programmes
- P13 Recognise when a problem cannot be dealt with internally, and arrange for the use of external contractors, within the limits of your authority
- P14 Recognise when a maintenance or repair issue is systemic, and raise this with the organisational leadership team
- P15 Manage maintenance and repair issues within the limits of your responsibility and budget, raising issues beyond these limits with the organisational leadership team
- P16 Ensure that all stakeholders are consulted as appropriate on key decisions, and that full and accurate information is made available to aid the decision making process
- P17 Employ appropriate negotiating techniques when dealing with external contractors, to ensure that the needs of the organisation are met
- P18 Ensure the required health and safety and insurance measures are in place during maintenance and repair work.
- P19 Use internal expertise wherever possible, to maximise cost efficiency
- P20 Review the effectiveness of maintenance and repair procedures and associated costs, to identify where improvements can be made

## PPL 4HK54(SQA Unit Code-H30B 04)

### Liaise with others to manage maintenance and repair work

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#### Knowledge and understanding

*You need to know and understand:*

- K1 Relevant health and safety legislation governing items which requires regular checks or maintenance
- K2 Organisational standards for both guest rooms and public areas
- K3 How energy-saving working methods can be incorporated into maintenance or repair plans
- K4 How regular recycling and energy-saving measures can increase the lifespan of equipment and resources
- K5 The organisation's forecasted levels of business activity
- K6 The impact of room closures on the organisation's planned activities
- K7 Who is responsible for different aspects of maintenance and repair
- K8 When issues need raising to internal or external staff outside the housekeeping team
- K9 The difference between maintenance and condition issues
- K10 The expected standard lifespan of equipment and resources under normal conditions
- K11 How to maintain good relationships with guests, when a repair or maintenance issue disrupts their stay
- K12 How and what to prioritise when developing maintenance and repair schedules
- K13 When external contractors are needed to conduct maintenance and/or repair, and the limits of your authority when negotiating with approved contractors
- K14 Any health, safety and insurance measures that need to be in place during maintenance and repair work
- K15 That certain problems may affect more than just your team, and when this should be raised to the senior management team
- K16 The limits of your authority and budget to authorise programmes of work
- K17 Where to obtain information to support decisions on major maintenance or repair issues
- K18 How to balance the needs of the organisation and guests when prioritising maintenance or repair work
- K19 What the organisation's internal maintenance staff can and cannot deal with

## **PPL 4HK54(SQA Unit Code-H30B 04)**

Liaise with others to manage maintenance and repair work

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### **Glossary**

#### **Maintenance required by legislation**

This may include, but is not limited to: Portable Appliance Testing (P.A.T.), Health and Safety checks on water tanks, testing of electrical appliances (used by both staff and guests), maintenance of fire exits, smoke sensors and alarm systems, fire risk assessments

## PPL 4HK54(SQA Unit Code-H30B 04)

Liaise with others to manage maintenance and repair work

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<b>Relevant occupations</b>	Accommodation Manager; Housekeeping Manager; Executive Housekeeper
<b>Suite</b>	Hospitality Management
<b>Key words</b>	Maintenance; repair; condition; reporting; testing; faults; health; safety; team

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## PPL 4HK55(SQA Unit Code-H30C 04)

### Manage additional services throughout the establishment



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#### Overview

As a manager in housekeeping, you may often find that it is your responsibility to manage other services around the establishment. These may include (but are not limited to): plants & flowers, window cleaning, maintenance of leisure facilities, cleaning of public areas.

It is often necessary to liaise with external contractors to deliver these services, operating within a budget acceptable to you and your organisation.

## PPL 4HK55(SQA Unit Code-H30C 04)

### Manage additional services throughout the establishment

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#### Performance criteria

*You must be able to:*

- P1 Identify the range of additional services for which your team will have responsibility
- P2 Develop a schedule for the provision and/or maintenance of additional services, taking into account available resources and organisational priorities
- P3 Liaise with other departments to identify ad-hoc issues within the establishment that may require the time of housekeeping staff
- P4 Negotiate with external contractors where necessary to carry out additional services, within the limits of your responsibility
- P5 Manage effectively any issues or disputes with relation to the provision of additional services
- P6 Ensure the budget for the provision and/or maintenance of additional services is factored into your overall budget
- P7 Monitor the work of both internal staff and external contractors in relation to additional services
- P8 Ensure all additional services are carried out to meet organisational and regulatory standards, minimising risk wherever it may exist
- P9 Recommend and implement actions to improve the provision of additional services, obtaining permission where necessary

## PPL 4HK55(SQA Unit Code-H30C 04)

### Manage additional services throughout the establishment

---

#### Knowledge and understanding

*You need to know and understand:*

- K1 The range of additional services for which you have management responsibility for delivering
- K2 The resources that are available for the delivery of additional services
- K3 How to prioritise the provision of additional services, according to organisational needs
- K4 Which additional minor issues your team can reasonably be expected to deal with during the course of their duties
- K5 How to negotiate effectively with potential external providers of additional services
- K6 How to deal effectively with issues or disputes relating to the provision of additional services, in a way that maintains the organisation's image and standards
- K7 The budget for additional services, and how to manage this within the context of the overall budget
- K8 The organisation's quality standards for additional services
- K9 Any regulatory requirements relating to the provision of additional services
- K10 How to assess risk in relation to the provision of additional services, avoiding unacceptable levels of risk at all times
- K11 How to evaluate and identify possible improvements to the provision of additional services



# PPL 4HK55(SQA Unit Code H30C 04)

## Manage additional services throughout the establishment

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### Scope/range

- 1 Additional Services**
  - 1.1 dry cleaning
  - 1.2 minor decoration
  - 1.3 seasonal decoration
  - 1.4 plants & flowers
  - 1.5 window cleaning
  - 1.6 housekeeping of leisure facilities
  - 1.7 provision of hygiene facilities
  - 1.8 butler/valet service
  - 1.9 cleaning of public areas
  - 1.10 cleaning of external areas
  - 1.11 carpets, upholstery and fabric cleaning

## PPL 4HK55(SQA Unit Code-H30C 04)

Manage additional services throughout the establishment

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<b>Developed by</b>	People 1st
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<b>Relevant occupations</b>	Accommodation Manager; Housekeeping Manager; Executive Housekeeper
<b>Suite</b>	Hospitality Management
<b>Key words</b>	Additional; services; dry cleaning; decoration; cleaning; housekeeping; contractors

## PPL 4HK56(SQA Unit Code-H30D 04)

### Manage linen service to deliver a high-quality provision



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#### Overview

This standard is for managers in housekeeping who have to manage the linen service of their organisation, whether this is done through an in-house laundry service, or by an external laundry company.

It involves managing linen stock levels, maintaining a high level of linen quality, and training a team to achieve this. As this is often one of the highest costs of a hospitality organisation, effective management of budgets and supplier relationships are also crucial.

## PPL 4HK56(SQA Unit Code-H30D 04)

### Manage linen service to deliver a high-quality provision

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#### Performance criteria

- You must be able to:*
- P1 Maintain par stock levels of linen for the establishment, sufficient to cover peak occupancy rates, and to cover contingencies such as conferences and functions
  - P2 Manage the day-to-day performance of the laundry contractor and linen room or on-premises laundry as appropriate
  - P3 Monitor that staff are trained in the safe use of machinery, cleaning supplies and chemicals where appropriate
  - P4 Ensure all housekeeping staff can identify evidence of contamination and/or infestation and deal with these appropriately
  - P5 Develop procedures for the handling of contaminated linen
  - P6 Effectively delegate supervisory responsibilities to key staff within your team
  - P7 Ensure that there are sufficient housekeeping staff to manage the in-house linen provision
  - P8 Ensure housekeeping staff have clear criteria for acceptance or rejection of linen received
  - P9 Monitor the percentage of 'rejects', taking action to reduce the amount where it exceeds service level agreements and /or organisational guidelines
  - P10 Ensure housekeeping staff check linen deliveries for quality and quantity, raising reported discrepancies directly with the laundry contractor / laundry room
  - P11 Intervene directly with the laundry contractor / laundry room where major discrepancies or problems with the linen service are identified
  - P12 Liaise with other departments to assess their need for linen
  - P13 Liaise with accounts or other financial team when managing the laundry contract
  - P14 Monitor room linen quality against organisational standards
  - P15 Implement and evaluate regular stock-takes of linen
  - P16 Manage the cost-effective purchasing of replacement linen stock and related items, in line with organisational purchasing guidelines

# PPL 4HK56(SQA Unit Code-H30D 04)

## Manage linen service to deliver a high-quality provision

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### Knowledge and understanding

*You need to know and understand:*

- K1 Organisational linen par-stock levels
- K2 Typical laundry costs per item
- K3 The terms and conditions of any contracts you are responsible for in respect to the linen service
- K4 Regulations governing the safe use of chemicals used in laundry service, and your organisation's guidelines for using them
- K5 The working methods of the laundry contractor and linen room or on-premises laundry
- K6 How to negotiate effectively with suppliers
- K7 The organisation's quality standards for linen provision
- K8 Safe working methods for dealing with contaminated linen
- K9 Acceptable levels of 'rejects' according to service level agreements/organisational standards, and how to ensure these levels are met
- K10 When linen discrepancies or problems require direct intervention
- K11 The different requirements other departments may have with regard to their linen stock
- K12 Turn-around times for linen service which meet the organisation's needs, including dry-cleaning
- K13 The importance of keeping the linen service within agreed budgets, and meeting profit and loss targets
- K14 The organisation's anticipated short-term occupancy rates
- K15 The organisation's projected levels of business activity
- K16 The organisation's linen storage capacity
- K17 How to implement and evaluate linen stock-takes

# PPL 4HK56(SQA Unit Code-H30D 04)

Manage linen service to deliver a high-quality provision

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## Scope/range

### 1 Linen

- 1.1 for guest rooms
- 1.2 for the restaurant
- 1.3 for other areas

### 2 Laundry service

- 2.1 on-premises laundry
- 2.2 laundry contractor

## PPL 4HK56(SQA Unit Code-H30D 04)

Manage linen service to deliver a high-quality provision

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**Originating organisation** People 1st

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**Original URN** PPL 4HK56

---

**Relevant occupations** Accommodation Manager; Housekeeping Manager; Executive Housekeeper

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**Suite** Hospitality Management

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**Key words** Linen; laundry; cleaning; housekeeping; rooms

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## PPL 4HK57(SQA Unit Code-H30E 04)

### Manage the supply of uniforms and housekeeping of staff areas



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#### Overview

This standard is for managers in housekeeping who are required to supply and maintain staff uniform, and who also may have to manage staff working areas, living areas or subsistence as part of their role.



## PPL 4HK57(SQA Unit Code-H30E 04)

### Manage the supply of uniforms and housekeeping of staff areas

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#### Performance criteria

*You must be able to:*

- P1 Ensure that staff uniforms supplied meet organisational guidelines
- P2 Liaise with management colleagues to discuss ongoing uniform / workwear requirements
- P3 Manage the supply of uniform / workwear that requires separate laundry or storage
- P4 Manage the ordering of new staff uniform in a way that ensures timely access to required stock at all times
- P5 Manage a system of staff uniform stock control, in which all issue of uniform is logged and accounted for
- P6 Develop a contingency system that can accommodate extra demand for staff uniform at short notice (e.g. large functions which require temporary staff)
- P7 Develop guidelines for organisational responsibility regarding the replacement of staff uniform, and ensure staff understand these
- P8 Manage the laundry of staff uniform, in a way which ensures adequate clean supplies are available to colleagues at all time
- P9 Manage the regular housekeeping of staff areas, whilst also monitoring that staff take responsibility for their own areas
- P10 Manage the security of staff areas, ensuring access is restricted to current employees of the business
- P11 Develop a system for the maintenance of staff areas, where equipment defects or faults are identified

## PPL 4HK57(SQA Unit Code-H30E 04)

### Manage the supply of uniforms and housekeeping of staff areas

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#### Knowledge and understanding

*You need to know and understand:*

- K1 Organisational guidelines governing staff uniforms
- K2 The changing uniform / workwear requirements of different teams within your organisation
- K3 Why certain uniform / workwear items require special laundry or storage, and how to ensure this happens
- K4 Par stock levels and delivery turnaround times which are required to meet staff uniform demand
- K5 The importance of having contingency plans in place regarding staff uniform, to deal with unusual levels of demand
- K6 Why it is important to have limits on what the organisation will replace regarding staff uniform, and how to ensure these limits are clearly understood by staff
- K7 Acceptable par stock levels and laundry turnaround times for staff uniform
- K8 The limits of the team's responsibility for the housekeeping of staff accommodation, and how to address any issues with staff relating to this
- K9 Why it is important that only current employees have access to staff areas, and how to enforce this within the limits of your responsibility.
- K10 How to develop a system for the regular maintenance of staff areas, and when management colleagues need to be involved in this
- K11 Organisational standards for the condition of staff areas, and for the conduct of staff that use them

## **PPL 4HK57(SQA Unit Code-H30E 04)**

Manage the supply of uniforms and housekeeping of staff areas

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### **Glossary**

**Uniform / workwear that requires separate laundry or storage**

For example - personal protective equipment (PPE); kitchen/chef whites

## PPL 4HK57(SQA Unit Code-H30E 04)

Manage the supply of uniforms and housekeeping of staff areas

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**Developed by** People 1st

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**Originating organisation** People 1st

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**Original URN** PPL 4HK57

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**Relevant occupations** Accommodation Manager; Housekeeping Manager; Executive Housekeeper

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**Suite** Hospitality Management

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**Key words** Staff; uniform; staff accommodation; staff areas; laundry; housekeeping

## PPL 4FB61(SQA Unit Code-H30F 04)

Ensure food and beverages are served to organisational standards



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### Overview

This standard is for managers working in food and beverage service, who have responsibility for ensuring that food & beverage service by their team consistently meets organisational standards.

They are likely to have supervisory staff actually managing the execution of service; however the training and ultimately the standards of service are likely to be the responsibility of these managers.

## PPL 4FB61(SQA Unit Code-H30F 04)

### Ensure food and beverages are consistently served to organisational standards

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#### Performance criteria

*You must be able to:*

- P1 Ensure all food and beverage service complies with relevant legislative and regulatory requirements
- P2 Manage and develop supervisory staff who understand the service requirements of the organisation, and can translate these requirements to the service team
- P3 Manage the preparation of service for special events, such as functions or special promotions
- P4 Ensure staffing is flexible enough to meet peaks and troughs of business activity
- P5 Create a working environment which motivates and inspires the food and beverage service team
- P6 Develop procedures for the preparation of the food and beverage service areas
- P7 Develop procedures for the clearing, cleaning and stocking of the food and drink service areas
- P8 Maintain an environment which is comfortable and attractive in line with the expectations of the existing customer base and the target market
- P9 Ensure the food and beverage service team understand their specific objectives relating to service, developing skills where necessary
- P10 Intervene and take action when planned food and beverage service operations are threatened with disruption
- P11 Ensure food and beverage service is carried out in a way which maximises profit without affecting the quality of the service
- P12 Liaise effectively with kitchen management to ensure an efficient flow of the service between the teams
- P13 Monitor the quality of food and beverage service through regular observation
- P14 Monitor the quality of food and beverages being served, dealing with any deviation from the recognised quality standard
- P15 Monitor that equipment maintenance is carried out on a scheduled basis
- P16 Evaluate the performance of food and beverage service on an ongoing basis

## PPL 4FB61(H30F 04)

### Ensure food and beverages are consistently served to organisational standards

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#### Knowledge and understanding

*You need to know and understand:*

- K1 All relevant legislative and regulatory requirements relating to food and beverage service
- K2 What level of responsibility can be delegated to the service team
- K3 The particular requirements of functions and special promotions with regard to staffing, equipment, supplies and organisation
- K4 Projected levels of business activity both in the short and long term
- K5 How to develop new procedures to make best use of the available resources
- K6 Your establishment's target customer market and the standards this market expects
- K7 How to motivate and inspire a food and beverage service team
- K8 Standard industry practices which help to ensure smooth running of service
- K9 Methods of staff development which can improve service standards
- K10 How to allocate staff objectives which reflect their ability and which feed into organisational objectives
- K11 How to create an attractive environment which makes customers feel at ease
- K12 The impact of ambient factors (sound, music, light, heating etc.) on the customer experience
- K13 When direct intervention is needed to ensure service operations are not disrupted
- K14 Budgetary responsibilities, including 'profit and loss' targets
- K15 Profit margins for all items, how these are calculated, and how to ensure the team can sell directionally in a discreet manner to maximise these
- K16 Quality standards for food & beverage service which reflect the organisation's aspirations
- K17 Organisational quality standards for all food and beverage menu items
- K18 How to monitor service performance unobtrusively
- K19 The required maintenance schedules for equipment used in your area of responsibility
- K20 How to evaluate the performance of food and beverage service

## **PPL 4FB61(H30F 04)**

Ensure food and beverages are consistently served to organisational standards

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### **Scope/range**

- 1 Disruption to**
  - 1.1 staffing
  - 1.2 equipment
  - 1.3 supplies



## PPL 4FB61(SQA Unit Code-H30F 04)

Ensure food and beverages are consistently served to organisational standards

---

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**Original URN** PPL 4FB61

---

**Relevant occupations** Food & Beverage Manager; Restaurant Manager; Bar Manager

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**Suite** Hospitality Management

---

**Key words** Food; beverage; service; organisation; environment; standards

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## PPL 4FB62(SQA Unit Code-H30G 04)

### Manage the organisation of the food and beverage service area



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#### Overview

This standard covers the organisation of the food and beverage service area, as bookings and functions demand. Reservations should reflect the capacity of the food and beverage service area, and the organisation of the food and beverage service area should balance the needs of both the customer and the organisation.

# PPL 4FB62(SQA Unit Code-H30G 04)

## Manage the organisation of the food and beverage service area

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### Performance criteria

- You must be able to:*
- P1 Ensure all relevant regulatory and legislative requirements are met by the layout of the food and beverage service area
  - P2 Use projected business activity to inform the organisation of the food and beverage service area and planning of staff allocation
  - P3 Ensure that the layout of the food and beverage service area maximises available space without compromising the quality of the customer experience
  - P4 Ensure that the layout of the food and beverage service area assists the normal flow of food service from kitchen to table
  - P5 Change the layout of food and beverage service areas as required for large reservations, functions or special promotions
  - P6 Monitor that the food and beverage service team, including supervisors, are clearly allocated their own tasks and service areas in a way which maximises their individual abilities
  - P7 Ensure all signage is clearly displayed for the benefit of guests, including those relating to emergency and security procedures
  - P8 Develop and manage a reservations system which captures the required information for bookings
  - P9 Use data from your reservations system to inform future planning and organisation of the food and beverage service area
  - P10 Develop an efficient system for shift handover which eliminates the risk for confusion in the team
  - P11 Monitor that your supervisory staff are effectively managing schedules of service, where applicable
  - P12 Intervene when serious disruption is caused to the organisation of food and beverage service, where this cannot be resolved by the food service team
  - P13 Deal with guest complaints where these cannot be resolved by the food and beverage service team
  - P14 Regularly review the efficiency of the organisation of the food and beverage service area

# PPL 4FB62(SQA Unit Code-H30G 04

## Manage the organisation of the food and beverage service area

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### Knowledge and understanding

*You need to know and understand:*

- K1 Regulatory and legislative requirements relating to food and beverage service
- K2 The normal flow of service from kitchen to table, and how best to organise the food and beverage service layout to complement this
- K3 The different layouts that may be required for functions, special promotions or large reservations
- K4 The organisation's projected business activity, and how to use this to forecast staff scheduling requirements and service area layout
- K5 The available options for table reservation systems and the benefits and drawbacks of each
- K6 The individual abilities of the members of your food and beverage service team(s), and how best to utilise these to the benefit of both the individuals and the organisation
- K7 The operational risks present during shift handover
- K8 Which items of information need to be prominent in the food and beverage service area to ensure an enjoyable and safe customer experience
- K9 Why service schedules are important to successful food and beverage service, and how to monitor their effective use
- K10 How to ensure the team can deal with the most common problems relating to food and beverage service
- K11 How to deal with guest complaints to the satisfaction of both the customer and your organisation
- K12 How to review and evaluate the success of the organisation of the food and beverage service area

# PPL 4FB62(SQA Unit Code-H30G 04)

## Manage the organisation of the food and beverage service area

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### Scope/range

#### **1 Organisation of the food and beverage service area**

- 1.1 reservations
- 1.2 table seating
- 1.3 phases of service

#### **2 Future planning**

- 2.1 seasonal activities
- 2.2 special events or functions
- 2.3 variations in projected business activity

## PPL 4FB62(SQA Unit Code-H30G 04)

Manage the organisation of the food and beverage service area

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**Relevant occupations** Food & Beverage Manager; Restaurant Manager; Bar Manager

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**Suite** Hospitality Management

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**Key words** Organisation; food, beverage; service; restaurant; bookings; layout; planning

## PPL 4FB63(SQA Unit Code-H30H 04)

### Develop beverage lists to complement the menu



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#### Overview

This standard covers the competences and knowledge needed to develop beverage lists (including wine lists) that complement the food provision, and the organisation's image.

# PPL 4FB63(SQA Unit Code-H30H 04)

## Develop beverage lists to complement the menu

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### Performance criteria

- You must be able to:*
- P1 Ensure that beverage lists meet relevant regulatory requirements
  - P2 Review the current beverage lists both for relevance to the menu, and contribution to gross profit
  - P3 Identify possible alternatives to beverages currently on the list(s)
  - P4 Discuss menu items with the kitchen management to help identify potential complementary beverages
  - P5 Identify types of wine that are generally considered complementary to each food group
  - P6 Use product information from food suppliers to help identify complementary beverage items for their products
  - P7 Ensure the service team have the relevant knowledge to advise customers about the available beverages
  - P8 Ensure the beverage lists reflects the organisation's image, pricing structures and target customer market
  - P9 Choose beverages for which there is appropriate cellaring or other storage facilities
  - P10 Discuss wines, spirits and other beverages with suppliers to make informed choices on behalf of the organisation
  - P11 Negotiate with beverage suppliers to obtain the best deal for the organisation, within the limits of your authority to do so
  - P12 Contribute to the development of alternative beverage lists for special occasions and different times of the year
  - P13 Contribute to the development of separate beverage lists where different (or no) food menus are in operation
  - P14 Manage the visual design of the beverage list to complement food menus and organisational style, where you have the autonomy to do so
  - P15 Obtain and analyse customer feedback on your beverage offering
  - P16 Analyse and evaluate the impact of newly developed beverage lists
  - P17 Report your evaluation of beverage lists to the organisational leadership team



# PPL 4FB63(SQA Unit Code-H30H 04)

## Develop beverage lists to complement the menu

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### Knowledge and understanding

*You need to know and understand:*

- K1 Current relevant legislation relating to licensing, weights and measures and any Licensing Objectives applicable to the country in which you are working
- K2 The current beverage offer's contribution to gross profit margins
- K3 Different types of wines and other beverages and their specific qualities
- K4 Which wines and other beverages may complement the planned menu, and why
- K5 The benefits of having locally and/or sustainably produced beverages available, and how to source these
- K6 Various beverage quality standards and what they mean
- K7 Why it is important to obtain the opinion of food suppliers regarding potential complementary beverages
- K8 How to ensure your team have sufficient knowledge on wines and other beverages to advise customers
- K9 Which types of beverages fit in with the organisation's style and pricing structures, and which would not
- K10 The organisation's target customer market, and the types of beverages they are likely to prefer
- K11 The available cellars and other storage facilities there are for beverages, and which beverages could be stored there whilst retaining their quality
- K12 How to negotiate effectively with suppliers
- K13 Suppliers' motives during the beverage sales process, and how to ensure your organisation gets the best possible deal
- K14 Which different types of beverages may be suitable for special occasions and / or different times of year
- K15 Why different menus and different styles of food service require different accompanying beverage options
- K16 The organisational style for the design of menus and lists
- K17 How to effectively obtain and analyse customer feedback on the beverage offering, using organisational systems where appropriate
- K18 How to evaluate the impact of changes to beverage lists, and present this evaluation in a constructive manner

# PPL 4FB63(SQA Unit Code-H30H 04)

Develop beverage lists to complement the menu

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## Scope/range

### 1 Beverages

- 1.1 red wines
- 1.2 white wines
- 1.3 rose wines
- 1.4 champagnes and sparkling wines
- 1.5 fortified wines, including port and sherry
- 1.6 spirits
- 1.7 liqueurs
- 1.8 cocktails
- 1.9 keg beer
- 1.10 bottled beer
- 1.11 cask '(real)' ale
- 1.12 non-alcoholic cold beverages
- 1.13 non-alcoholic hot beverages
- 1.14 alcoholic hot beverages

## PPL 4FB63(SQA Unit Code-H30H 04)

### Develop beverage lists to complement the menu

---

#### Glossary

##### **Beverage Quality Standards**

This refers to widely accepted industry quality standards for different types of beverages. These may include, but are not limited to (depending on the products the organisation sells): *vin de table/vin de pays, appellation contrôlée, grand cru, grand cuvée, sec/demi-sec/brut, real ale/cask ale, single malt/blended, VS/VSOP/XO, freshly pressed juice/juice from concentrate*

## PPL 4FB63(SQA Unit Code-H30H 04)

Develop beverage lists to complement the menu

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**Relevant occupations** Food & Beverage Manager; Restaurant Manager; Bar Manager

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**Suite** Hospitality Management

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**Key words** Beverages; drinks; alcoholic; non-alcoholic; complement; menu

## PPL 4FB64(SQA Unit Code-H30J 04)

### Participate in the production and presentation of the menu



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#### Overview

This standard is for managers of food and beverage service who along with those in charge of food preparation and production, are responsible for the contents and presentation of the food menu.

It concerns the manager's responsibilities for helping to develop menus, in conjunction with the head chef, kitchen manager or others in charge of food preparation and production.

## PPL 4FB64(SQA Unit Code-H30J 04)

### Participate in the production and presentation of the menu

---

#### Performance criteria

*You must be able to:*

- P1 Review the current menu with the organisational leadership team, with regard to profit margins, style and current trends
- P2 Assimilate feedback (both qualitative and quantitative) from customers to help inform menu development
- P3 Analyse feedback from the kitchen management team regarding any issues with the production of current menu items
- P4 Follow organisational guidelines when developing the menu
- P5 Take into account ingredient prices and availability when developing the menu
- P6 Discuss with the kitchen management team, the practicality of cooking and serving proposed new menu items with available resources
- P7 Contribute to developing a menu which maximises profit margins without compromising on the quality of ingredients or dishes
- P8 Contribute to developing menus for special occasions and events, in a way which appeals to the target customer market
- P9 Ensure that menu items complement each other and the beverage list
- P10 Ensure the food and beverage service team understand the new menu's contents, and any specialist serving techniques required
- P11 Manage the design of the menu to ensure attractive presentation of menu options, whilst conforming to any organisational style
- P12 Present the proposed menu to the leadership team for comment and analysis
- P13 Analyse and evaluate the impact of newly developed menus
- P14 Present menu evaluation to the leadership team

## PPL 4FB64(SQA Unit Code-H30J 04)

### Participate in the production and presentation of the menu

---

#### Knowledge and understanding

*You need to know and understand:*

- K1 Current trends in gastronomy – both locally and across the industry, and how your organisation can utilise these in menu development
- K2 Sales figures and profit margins of the current menu items
- K3 Practicalities within the kitchen and food production areas which can affect the feasibility of offering certain proposed menu items
- K4 Organisational guidelines which may dictate the menu content
- K5 Price levels and availability of raw ingredients, and the likelihood of future variations in price or availability
- K6 How resources like staff, equipment and space can affect your ability to offer certain menu items
- K7 How to calculate the profit margin for any proposed menu item, and the relationship between cost and profits
- K8 How dishes and beverages can complement each other on a menu
- K9 The best ways for the food service team to learn about the contents of the new menu and how to serve it
- K10 Styles of menu design which help to guide and inform the choice of the customer
- K11 How to synthesise feedback from colleagues with other factors when evaluating the success of the menu

## PPL 4FB64(SQA Unit Code-H30J 04)

Participate in the production and presentation of the menu

---

**Developed by** People 1st

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---

**Relevant occupations** Food & Beverage Manager; Restaurant Manager; Bar Manager

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**Suite** Hospitality Management

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**Key words** Menu; development; courses; food, beverage; management; hospitality



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### Overview

This standard covers the management of the cellar, which may involve controlled temperature locations for the storage of different wines, beers, and other beverages. Although others are likely to be responsible for day-to-day cellar operations, you will closely monitor consumption levels, stock rotation, and availability, as well as quality points and health and safety considerations.

# PPL 4FB65(SQA Unit Code-H30K 04)

## Manage cellar operations

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### Performance criteria

- You must be able to:*
- P1 Manage cellar and beverage storage procedures which comply with relevant legislation and organisational policies
  - P2 Manage cellar and beverage storage procedures which maintain the quality of beverage products
  - P3 Ensure the food and beverage team are trained in cellar and beverage storage procedures, including those colleagues who may only have occasional duties in those areas
  - P4 Ensure customer-facing members of your team are regularly appraised of any cellar or beverage storage issues which may impact on beverage service
  - P5 Manage stock ordering and rotation procedures which will maximise the shelf-life of beverage products
  - P6 Ensure your team take effective action to address problems relating to cellar and beverage storage
  - P7 Develop contingency plans that can be implemented in the event of problems with the cellar and/or beverage storage
  - P8 Manage any recurrent issues with the suppliers of beverages, which may impact on the quality or condition of your beverage stocks
  - P9 Ensure cellar and beverage stocks are audited on a regular basis, and any problems highlighted are dealt with in line with organisational procedures
  - P10 Manage the accurate supply of beverage items to different bars, where relevant, and any variations required in terms of products and prices
  - P11 Monitor that beverages supplied are at agreed prices, in the agreed quantity and quality, and that any discrepancies are dealt with by your team in line with organisational procedures
  - P12 Communicate and explain any planned changes to cellar and beverage stock lists or storage procedures to your team
  - P13 Review cellar and beverage procedures on a regular basis
  - P14 Report on cellar and beverage operations to the leadership team on a regular basis

# PPL 4FB65(SQA Unit Code-H30K 04)

## Manage cellar operations

---

### Knowledge and understanding

*You need to know and understand:*

- K1 Current relevant legislation relating to licensing, weights and measures and any Licensing Objectives applicable to the country in which you are working
- K2 The health, safety and hygiene legislation and codes of practice which relate to cellar and drink storage operations
- K3 The different storage procedures used for typical beverage products in order to maintain their quality
- K4 Quality points at the point of opening of typical beverage products
- K5 Organisational policies which may impact on the development of cellar and beverage storage procedures
- K6 Why all members of the food and beverage service team need to remain aware of cellar and beverage stock issues
- K7 Effective methods of monitoring your team's performance with relation to stock audits and rotation
- K8 How to develop contingency plans to deal with threats to the effective performance of cellar operations
- K9 When problems highlighted by audits are sufficiently serious that you must intervene directly
- K10 How to manage supplier contracts to the benefit of your organisation, taking into account the different factors which inform supplier behaviour
- K11 How to effectively communicate procedures to your team, regarding cellar and beverage storage operations
- K12 Salient points regarding cellar operations performance that need to be reported to the leadership team

# PPL 4FB65(SQA Unit Code-H30K 04)

## Manage cellar operations

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### Scope/range

- 1 Legislation**
  - 1.1 health and safety
  - 1.2 licensing
  
- 2 Problems**
  - 2.1 out-of-date stock
  - 2.2 stock shortages
  - 2.3 beverage quality issues

# PPL 4FB65(SQA Unit Code-H30K 04)

## Manage cellar operations

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**Relevant occupations** Food & Beverage Manager; Restaurant Manager; Bar Manager

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**Suite** Hospitality Management

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**Key words** Manage; cellar; operations; storage; beverages; wine; beer; licensing

## PPL 4FB66(SQA Unit Code-H30L 04)

Develop a team to provide enhanced levels of food and beverage service



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### Overview

This standard is aimed at managers in hospitality who are aiming to provide a high quality food & beverage service, which will be delivered by a well-trained team who can advise customers from a base of sound product knowledge.

## PPL 4FB66(SQA Unit Code-H30L 04)

### Develop a team to provide enhanced levels of food and beverage service

---

#### Performance criteria

- You must be able to:*
- P1 Establish food and beverage service procedures appropriate for the level of dining for each food and/or beverage service area
  - P2 Ensure the team understands and applies the fundamental principles of high-quality food and beverage service
  - P3 Develop procedures that promote anticipative but unobtrusive service
  - P4 Develop a service team which understands the importance of body language, and its impact on the quality of service
  - P5 Identify through continuous review, areas of the service team's current procedures that could be improved
  - P6 Develop guidelines for behaviour, dress and performance which align to organisational standards
  - P7 Benchmark your organisation's levels of food and beverage service against competitors that operate at a similar level
  - P8 Ensure the service team has sufficient product knowledge on food and beverage items to be able to explain them to customers, and recommend complementary items where appropriate
  - P9 Manage the service team to achieve a flow of food and beverage service from kitchen and bar to table, which appears seamless to the customer
  - P10 Ensure that the service team has the product knowledge to recommend the appropriate beverage(s) for all menu items
  - P11 Ensure the service team can recognise when customers may be celebrating a particular occasion, and are able to adapt their service accordingly
  - P12 Ensure the service team are trained to recognise opportunities to up-sell or switch-sell food and beverage items, where this maximises profit without impacting the quality of the customer's experience
  - P13 Monitor that the service team can deal with customer incidents in a way that balances the needs of the customer and the organisation
  - P14 Develop procedures which ensure that customers with additional requirements are assisted in a way which does not highlight these requirements to other customers
  - P15 Use customer complaints to create learning points for the service team

## PPL 4FB66(SQA Unit Code-H30L 04)

### Develop a team to provide enhanced levels of food and beverage service

---

#### Knowledge and understanding

*You need to know and understand:*

- K1 Recognised industry standards for different styles of food and beverage service
- K2 The fundamental principles of high-quality food and beverage service
- K3 Why anticipative but unobtrusive service can enhance the customer experience, and how to develop procedures to deliver this
- K4 Organisational standards for the dress, behaviour and performance for the service team, and how to ensure these are adhered to
- K5 How to benchmark your team's performance against that of competitors
- K6 How the service team's product knowledge can improve the relationship between them and the customer
- K7 Ways to ensure that the service team has the product knowledge to recommend the appropriate beverage(s) for all menu items
- K8 How body language helps a service team give the impression of high quality service
- K9 How to achieve the impression of seamless service from kitchen or bar to the customer
- K10 How the response of the whole service team to a customer's special occasion can enhance the customer experience
- K11 How to develop your team's ability to promote selected menu items in a way that maximises organisational profit
- K12 Why customer incidents must be dealt with in a way that balances the needs of the customer and the organisation
- K13 The importance of dealing with customers with additional requirements in a way that meets their needs unobtrusively
- K14 How to use customer complaints to create learning points for the service team



## PPL 4FB66(SQA Unit Code-H30L 04)

Develop a team to provide enhanced levels of food and beverage service

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**Relevant occupations** Food & Beverage Manager; Restaurant Manager; Bar Manager

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**Suite** Hospitality Management

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**Key words** Enhanced; service; dining; customer; experience; fine; product knowledge;