Food and Beverage Supervisor (9084-31)

Version 1 March 2018

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1 Introduction

What is in this document

Recording forms to be used by end-point assessment customers/employers/training providers:

- Gateway declaration form
- Business project proposal recording form Task 1
- Business project recording form Task 2

This document must be used alongside the assessment pack for independent end-point assessors (IEPAs).

How to use the forms

Centres/end-point assessment customers/employers/training providers must use the forms provided by City & Guilds in the format laid out in this document.

Gateway form

This must be completed with the apprentice and submitted to City & Guilds as part of the end-point assessment (EPA) booking process.

Business project evidence reference form

The business project evidence reference form should be completed prior to the professional discussion.

The competencies listed under the pass and distinction grading criteria form the basis for the business project. In the evidence reference column, you should reference the areas of the standards that your business project links to.

If you are asked by the IEPA or City & Guilds to review the evidence that has been submitted, you should add to and amend the form you originally submitted.

If you are resitting the assessment you should only complete the sections for any new evidence submitted.

You can either complete this form electronically or print a hard copy to write on. If printing a hard copy you might want to increase the size of the boxes to write in prior to printing the form.

End-point assessment gateway declaration form

Completion of this gateway declaration form confirms that the employer/training provider is satisfied the apprentice has fulfilled all requirements to request their consideration for end-point assessment by City & Guilds.

Apprenticeship Standard	Title	**Start date**	DD/MM/YY
Apprentice name	Apprentice name	**Enrolment number**	1234567

Entry requirement	Achieved (Yes/No)

You must submit evidence of achievement of the above to City & Guilds as part of the gateway process. It is the provider's responsibility to retain auditable evidence. Any non-disclosure of information requested could subsequently result in the end-point assessment booking being cancelled.

Any previous end-point assessments	
Has the apprentice previously taken any assessments that form part of the EPA for this apprenticeship standard with any other assessment organisation?	Yes/No
If yes	
What assessment organisation was the EPA carried out by?	
What date(s) was the EPA taken?	
What grade(s) (eg fail/pass/merit/distinction) was issued?	

Employer/training provider declaration:

I confirm that the apprentice has achieved all EPA entry requirements as listed above and obtained the required knowledge, skills and behaviours covering the full apprenticeship standard to be eligible for EPA. The gateway process has been carried out to confirm the following.

1. The apprentice has been employed throughout the duration of his/her apprenticeship.

2. The ILP and commitment statement has been signed by the apprentice, the employer and the training provider, and all three parties have retained a signed and dated version.

3. The apprentice has been given appropriate time to attend the on- and off-the-job training required for the apprenticeship standard.

4. The apprentice has completed a minimum of 12 months of on-programme learning and all pre-requirements for eligibility for EPA.

Employer	Name and signature	**Date**	DD/MM/YY
Training provider (if appropriate)	Name and signature	**Date**	DD/MM/YY

Apprentice declaration:

I confirm that I have undergone a gateway process to confirm that I am eligible for EPA and give consent to City & Guilds EPAO to apply for the apprenticeship certificate on my behalf to the ESFA and the Institute for Apprenticeships (IfA) upon successful completion of EPA.

Apprentice	Name and signature	**Date**	DD/MM/YY

Level 3 Hospitality Supervisor

Assessment 701/751: Business project declaration of authenticity

Apprentice	Name	**Enrolment number**	1234567

Apprentice declaration:

I confirm that all work submitted is my own, and that I have acknowledged any sources I have used.

Apprentice	Signature	**Date**	DD/MM/YY

Tutor/assessor declaration:

I confirm that all work was conducted under conditions designed to assure the authenticity of the apprentice's work, and am satisfied that, to the best of my knowledge, the work produced is solely that of the apprentice.

Tutor/assessor	Signature	**Date**	DD/MM/YY

Level 3 Hospitality Supervisor

Assessment 701/751: Business project proposal recording form

Task 1

Apprentice name	Joe Travis	Assessment date	

Business project proposal
Stock control has become an issue at the privately-owned Riverside restaurant due to individual departments ordering their own stock and no one overseeing what is being ordered and held in stock on a daily/weekly basis. This has resulted in the quality of goods purchased being compromised and, in some cases, higher levels of waste which then impacts on profit margins. The areas that will be included in the project are: Identifying the key issues relating to stock control and ordering of consumables, dry goods, paper goods and wet stock within the bar, restaurant and kitchen whilst considering the procedures used and suppliers available to the business. Evaluating the systems and procedures currently used to identify good and poor practices; areas to prioritise for improvements and staff understanding of the importance of stock control. Identifying the range of stock ordered by each department and the frequencies to inform where standardisation can be implemented. Considering the impact on profit margins of holding too much stock; storage space available; shelf life; volumes of business and budgets. Researching stock control issues within the hospitality industry and in particular in privately owned businesses to identify similarities, impacts and possible solutions. Investigating computerised stock control and on-line ordering systems that would be suitable for the business and how they would contribute to improving the control of costs, reducing waste and improving cash flow. Suggest the alternatives that can be implemented by the Riverside to reduce the issues around stock control whilst justifying any cost implications versus the benefits it will bring to the business, environment and customers. Consider the impacts of introducing new systems/procedures on staff training, suppliers and the business together with the time scales for measuring the benefits. Proposing the best solution for the Riverside restaurant to address the stock control issue whilst meeting the business and customer needs.
IEPA approval/feedback

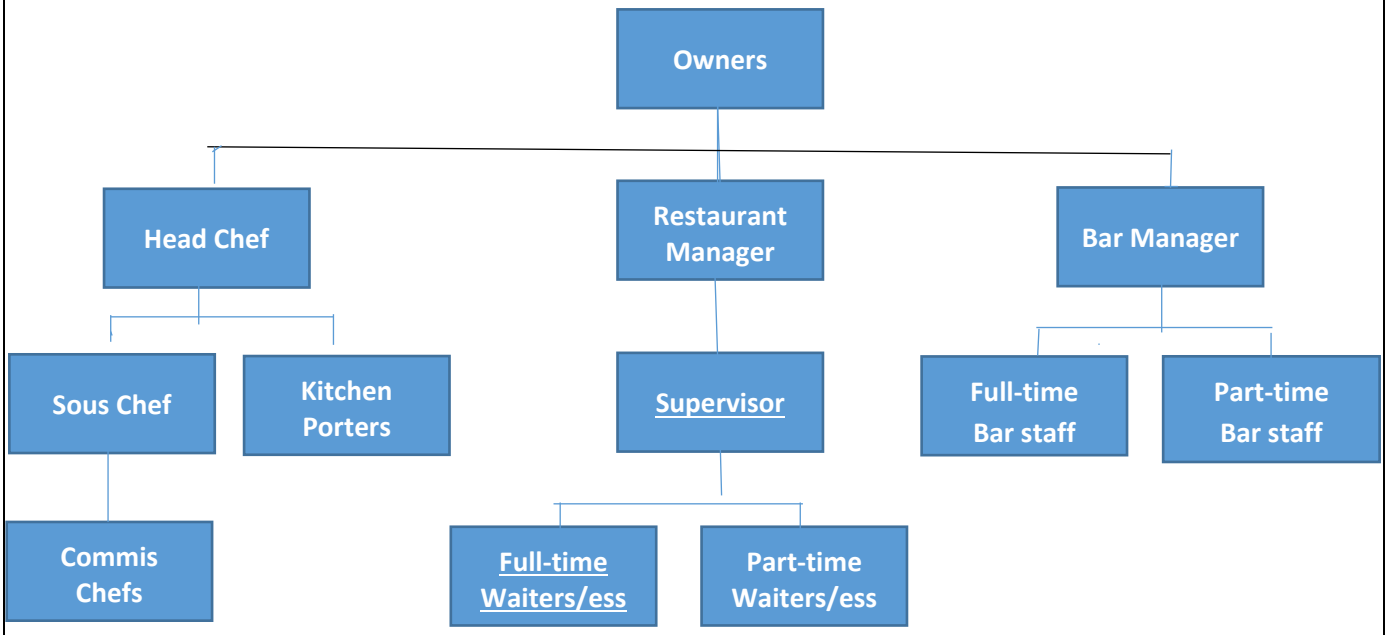
Level 3 Hospitality Supervisor

Assessment 701/751: Business project recording form

Task 2

Apprentice name	Joe Travis	Assessment date	

Business project
Introduction and background
The Riverside restaurant is privately owned and located in a rural setting just outside of Oxford, it is popular with locals, tourists, businesses and has a high volume of regular customers. The restaurant is open from 11.30 am–2.30 pm for lunches and from 5.00 pm–11.00 pm for dinners seven days a week. The busiest times are evenings and weekends with the restaurant being fully booked most Friday and Saturday evenings as well as Sunday lunch. The restaurant has 50 covers with some additional seating in the bar area for customers requiring lighter meals. An a la carte menu is offered with seasonal specials as well as a traditional roast menu on Sundays. The restaurant is not tied to a brewery for beverages so is able to select the suppliers for beers, wines and spirits which enables them to negotiate prices. The staffing structure of the business is:



The kitchen is managed by the head chef who has a team of five full-time staff, there is a restaurant manager and bar manager who both have teams consisting of full- and part-time staff. They all report to the owners who live locally but are not involved in running the business on a daily basis, they have weekly meetings with the managers to review the business performance and to discuss any issues.

The managers are an established team who have been working at the Riverside for a number of years and have been actively involved in building the level of business and its reputation.

The main competition for the Riverside is the growing number of branded restaurants in and around Oxford as well as a number of independent restaurants ranging from fine dining to pubs offering casual dining. It is therefore paramount that the restaurant stays ahead of the game to ensure the continued profitability of the business whilst meeting the customer needs.

The restaurant has an average weekly turnover of £32,000 with an average customer spend of £40 for food and wine and work to a 65% gross profit for menu items and 80% gross profit for wet sales. The owners set budgets and sales targets for the management team so it is really important that they work together to ensure these are met and maintained.

The bar manager completes a physical stock take on a monthly basis as the owners feel this is the area that poses the greatest risk. Whereas the chef and restaurant manager carry out stock takes on a more ad-hoc basis, checking the stock they are holding prior to placing orders. Stock par levels are not set but based on predicted volume of business for the week/month. There are some items of dead stock sitting in the stores due to over ordering, this includes seasonal items like Christmas cracker, and some beverages that were ordered as part of a special offer but then did not sell. This has impacted on costs and profit margins.

A range of suppliers are used and where possible food items are sourced locally and in season, national suppliers are used for dry goods, cleaning products and disposable items. Beverages are purchased from a combination of wine suppliers and breweries with view to sourcing the best prices.

The restaurant currently has a computerised system for customers' orders and billing but it is not linked to stock control or ordering. The managers place orders by telephone, although they are able to place orders with some suppliers by leaving a voice message for next day delivery this can be risky as there is no guarantee the order will be processed or understood correctly.

Orders for the kitchen are placed on a daily basis for meat, fish, dairy, fruit and vegetables with weekly orders being placed for dry goods, cleaning agents and disposables. The bar manager places an order for beers, spirits and soft drinks weekly and for wines fortnightly, any fruits and vegetables required to garnish drinks are obtained from the kitchen as when they are needed which can sometimes result in insufficient stock being available or the kitchen holding too much for the bar. The restaurant manager places orders with a local coffee supplier for hot beverages, an order for sauces, accompaniments and seasonings is made when the items are required but not put through with the kitchen order to keep invoices separate. Cleaning and disposable items for the bar and restaurant again are ordered separate to the kitchen although the same suppliers are used which can cause issues if the deliveries are being received by the kitchen.

Orders for major equipment has to be authorised by the owners but the managers can re-order small items such as glassware, cutlery and crockery as long as it is within their budget.

It would appear that currently a combination of 'Just in time' and 'Fixed period' ordering methods are being used.

Business project
Focus aims and objectives

The aim of the project is to improve stock control and ordering procedures at the Riverside restaurant resulting in a higher level of efficiency and profits.

The objectives for the project are to:

- raise awareness of the impact of the stock control issues
- research alternative systems and make suggestions to improve the management of stock
- outline how a new system will be implemented to ensure the business is not interrupted
- justify any cost implications versus the benefits a new system will bring to the business, environment and customers
- outline the time scale and how the benefits to the business will be measured.

The focus of the project is:

- to identify the key issues relating to stock control and ordering procedures
- to evaluate the systems and procedures currently used to identify good and poor practices
- the impact on profit margins of holding too much stock; storage space available; shelf life; volumes of business and budgets
- stock control issues within the hospitality industry and in particular in privately-owned businesses to identify similarities, impacts and possible solutions
- to investigate computerised stock control and on-line ordering systems that would be suitable for the business and how they would contribute to improving the control of costs, reducing waste and improving cash flow
- areas to prioritise for improvements
- staff understanding of the importance of stock control
- suppliers available to the business, ordering systems and delivery options
- the impacts of introducing new systems/procedures on staff training, suppliers and the business together with the time scales for measuring the benefits.

Business project
Research
To establish the facts on the current procedures being followed in each department I have interviewed the three managers, I also asked them what issues they have identified and if there are any solutions they think could be implemented. I have also established the level of input the owners have to identify if some of the issues are due to the managers having to follow procedures set by the owners. I have spoken with members of the kitchen, restaurant and bar teams to find out their understanding of the importance of stock control, what training they have received and if they are made aware of stock shortages. To see for myself what actually happens during a stock take and when ordering stock in the three departments I have shadowed the managers asking questions to check how and why things are done in a particular way whilst taking notes. To broaden my understanding of issues in other privately-owned restaurants of a similar size I have undertaken internet research as well as reading articles in trade magazines. The managers have also been able to tell me about how stock was managed in other restaurants where they have worked. It was important for me to research systems and procedures that would be suitable to suggest to the managers/owners as a way to improve the stock control and ordering procedures currently used. I have considered paper-based systems as well as computerised systems and ways in which the procedures could be monitored to evaluate the improvements. I have looked at the possibility of additional software options that could be compatible and link with the current computerised system used for order taking and billing to stream line the whole process from purchasing stock through to customer billing and analysing business performance.

Business project

Findings

Having carried out research and spoken with the managers and team members I have identified a number of issues and possible ways that improvements could be made.

Firstly, the managers all agree that the stock control and ordering systems are not as efficient as they could be and feel they need to have a system they all use that is not only time saving but helps to control costs.

The key issues appear to be:

1. The managers work in isolation when ordering stock and do not speak to each other, resulting in excess stock of items they all use.
2. Whilst the 'just in time' method helps to control costs it often results in shortages or actually running out of items which can then result in loss of sales.
3. Only the bar manager carries out regular stock takes and so uses actual stock levels to inform ordering on a weekly basis.
4. The chef and restaurant manager do not use accurate stock information when ordering but simply do a visual check.
5. Whilst the menus do not change on a daily basis meaning the chef should know the food items required, ordering is not always accurate due to fluctuations in business or customer menu choices.
6. All three managers tend to stay with the same suppliers rather than sourcing best prices and negotiating to reduce costs.
7. The only input the owners have is with the wine supplier used as it is a personal friend who put the wine list together and gives preferential rates, the wine list appears to have stayed the same for a number of years.
8. Whilst the owners are happy with the annual profits they appear to be happy to trust the managers in running the business which could result in the business performance not being as good as it could be.

Team members are aware of controlling and recording waste but do not appear to understand the reasons as they think it is just to check on their working practices rather than contributing to controlling costs.

Typical examples of bad practice is using paper napkins to mop up spillages, throwing unused sauces away at the end of service rather than covering and storing, preparing too much fruit for drink garnishes, not always using FIFO when restocking.

Team members have not received any formal training on stock control procedures since being employed and are just doing as they are told without any real understanding of the impacts.

(Bar, Kitchen & Restaurant Teams)

The systems currently used:

Bar

Physical counts of wet stock are carried out by the bar manager on the first Monday morning of the month and recorded using paper documentation to identify stock levels for each item. A calculation is completed by taking the stock level from the previous month adding on the deliveries and minus the current stock to work out what has been used. This is then compared with takings to identify any shortages.

A professional stock taker is employed an on annual basis to provide figures for the end of year accounts. This has highlighted discrepancies' when compared with the monthly internal stock take.

When restocking the bar, the team are responsible for ensuring stock is rotated using FIFO which should mean that stock does not go out of date.

The same procedures are used in the cellar to make sure kegs, bottles of beers, soft drinks and spirits are rotated to avoid waste.

Any breakages, spillages, mistakes in pouring drinks and waste through cleaning the beer lines are recorded in the wastage book. If there are any breakages identified when accepting deliveries these are noted to make sure credits are received.

The bar manager is responsible for taking till readings at the end of the shift and recording takings as well as any shortages.

When the manager identifies significant differences when calculating the stock versus sales on a monthly basis the waste levels are reviewed before speaking with the team to address the problem. In

the past there was an issue with team members not recording complimentary drinks which must be authorised by the manager.

Drink orders for the restaurant are placed using the computerised system so all sales are recorded, this system should ensure that no drinks are served unless entered into the system. The only time they may be missed off of a customer's bill is when ordered on arrival and bar staff do not set up the table number.

Although the kitchen orders its own alcohol for cooking there are occasions when they will ask the bar for an item such as beer for a dish, whilst this should be recorded as a transfer there are times when this does not happen.

The cleaning chemicals used by the bar team are ordered and stored separately but do not appear to be monitored in the same way as the beverage items. (Bar Manager)

Restaurant

The stock used in the restaurant is mainly disposable items such as napkins, tea and coffee which are stored in a cupboard at the back of the service area. Although the manager has the keys for the store it is often left unlocked for easy access. The other stock items are condiments, sauces, milk and sugar, which are all stored in a stills area but not locked away which means that the kitchen and bar can help themselves. These items are all calculated within the food costs even though the restaurant manager is given a budget for ordering.

The restaurant team use cleaning chemicals that are stored in the kitchen so there is not a separate stock held or monitored by the manager.

The restaurant manager carries out visual checks to identify when more stock is required and will then place an order. When the delivery arrives, it is checked and stored away in the appropriate area with stock takes only being carried out around four times a year. (Restaurant Manager)

Kitchen

The chef is placing orders on a daily basis as the restaurant uses fresh produce whenever possible for the menu items. These orders are placed with local suppliers who have been used for a number of years and the restaurant has built up a strong relationship with. Deliveries are received six days a week, Sunday being the only day that deliveries are not made. This ensures all produce is fresh as long as it is used, there are occasions when a surplus is held particularly at the weekend. A dry goods order is placed weekly which includes frozen items, cleaning materials and disposables. Stock rotation procedures are in place but do not always happen if items are not stored in correct date order. The chef makes the kitchen team aware of waste % but they do not fully understand how it is measured or controlled. The chef does not record deliveries in the same way as the bar manager but relies on using invoices to check spending against budget and then is provided with the sales figures from the restaurant manager. The till system does allow an analysis of dishes being sold to identify what is popular and what is not selling which can be used to inform ordering levels. (Head Chef)

It is apparent that a very basic system is being used with a number of flaws which are impacting on costs and profit margins. The managers are reliant on paper-based systems for managing stock but using a computerised system to record and analyse sales. There is a lack of communication between the departments resulting in duplicate ordering and excessive stock being held. Whilst good relationships exist between the restaurant and suppliers there is still a need to look at other supplier prices to manage costs.

There are separate storage areas being used by the departments which again needs looking at together with security to streamline the process of receiving deliveries and issuing stock.

The possible improvements that could be made are:

- introducing a stock control software that is compatible with the current computerised system
- introducing par levels for stock items
- streamlining ordering of shared stock items such as cleaning materials and disposables
- standardising frequencies of internal stock takes

- standardising paperwork used for recording stock, requisitioning, recording waste etc
- implement formal training on stock control for all team members.

Manual systems versus computerised systems

A manual system is often considered simpler to use and when designed to meet the business needs is sufficient for managing stock in smaller establishments. It will often give the owners of a small business a greater sense of control as they can carry out visual checks of stock held prior to re-ordering.

It can be labour-intensive as continuous monitoring is required to identify what has been used, it can also require information to be entered in a number of places or copied. It increases the possibility of human error as the team can forget to record information or miscount items leading to over/under ordering. A key factor is that a manual system is cheaper to implement but records can be misplaced and more storage space is required to hold the records.

A computerised system can inform the team of up-to-date stock availability because it is synced with sales showing a running tally of what is in stock and what isn't. So, for control of beverages it is far more efficient. It can be set to alert the need to order once stock has dropped below a predetermined level. The system can be integrated with accounting software to track cash flow and to produce comprehensive financial statements. Some systems will also aid forecasting and planning allowing the restaurant to identify trends in menu items and beverages throughout the year.

The biggest problem with any computerised system is the potential for it to crash or other technical issues which can result in a loss of data or data not being accessible. There is a need to ensure that data is regularly backed up.

Whilst not having to carry out physical counts of stock can be seen as an advantage it can also be a disadvantage as spoilage and damage to stock still needs to be identified as well as any pilferage.

As systems are automated they are less labour-intensive and information can be accessed by a number of users at any one time.

Systems can be linked to a range of suppliers for ordering as well as to a number of ordering procedures such as on-line ordering, electronic devises etc. to record sales and stock usage.

A computerised system will take the guess work out of ordering as it is based on actual data however there is still a need to be able to over-ride it if a stock item is no longer required.

The system can be linked to standardised recipes which will identify ingredients required and wastage levels. It can also produce usage reports on beverages identifying variances, including over-pours, excess and loss.

If a mid-sized restaurant was paying £200 per month for a stock control and purchasing system they could see a saving of between 2–7% on costs.

Administrative costs can be reduced as receipts no longer have to be matched to deliveries and therefore redundant information is longer keyed in.

Whilst 'just in time' ordering practices help to reduce costs by only holding stock required at a given time it is also important to consider:

- The re-ordering lead time to ensure there is sufficient time between the order being placed and the stock being delivered.
- Economic order quantity which is a formula used to ensure there is a balance between holding too much or too little stock.
- FIFO – first in first out to ensure stock is used efficiently to prevent deterioration.
- For stock items that usage does not fluctuate it is possible to order fixed quantities or order at fixed intervals but it is important to monitor quantities required and prices.

Branded restaurants use fully integrated computerised stock systems that are linked to procurement, accounting packages and electronic point of sales so that orders are placed based on sales whilst considering forecasting. This ensures that up-to-date information is available at all levels whilst procedures are standardized across the business and performance can be measured.

Whichever system is used it is important that it fully integrates all stock with purchasing and sales; frequent and accurate stock checks are made to reduce the risk of low profit margins; all stock items need to be accounted for not just food and beverages; data on items, par levels and recipes is accurate and maintained and adequate staff receive training to use and understand the system and information it produces.

Business project
Conclusion and recommendations

In conclusion there are some key facts relating to stock control and purchasing that need to be reinforced to the whole team at the Riverside. This could be addressed through a training update carried out by the three managers so it is directly related to the areas the teams work in but with generic content to ensure they all receive the same message.

The generic content should include:

- waste management procedures and importance so team fully understand the impacts
- stock rotation procedures to ensure FIFO is always implemented
- security of stock and locking storage areas.
- records to be completed relating to requisitioning, complimentary items, transferring stock as well as breakages and waste
- individual responsibilities.

The managers need to determine ordering frequencies to be used and set up a purchasing system that avoids duplicating stock so it is better managed. This can be done by establishing the cleaning stock required, storing it in one place so levels are easily identified and one order placed to replenish. This will avoid waste, ensure COSHH regulations are followed in the storage and use of chemicals, improve security as each manager can hold a key and record stock being used. The same system can be used for disposable items although the restaurant is more likely to be using the napkins, the kitchen will be using foil, baking parchment and probe wipes whilst the bar will be using small napkins, straws, and drink stirrers, all three departments will be using blue roll.

When it comes to specific stock items the bar manager will continue to order the beverages but will inform the kitchen of drink garnish requirements such as fruit and herbs to ensure sufficient supplies are available. This will also ensure that accurate calculations can be made on the beverage costs.

The food stock items required by the kitchen and restaurant should be combined for ordering purposes with the restaurant manager informing the kitchen of the condiments, milk and sugars needed to maintain stock levels. The restaurant will then place separate orders for hot beverage resources with the coffee supplier.

The three departments need to set up par levels for stock to inform ordering requirements and to avoid over ordering. This needs to be in place for all of the beverages, disposable items, cleaning products and dry goods, it will not be as easy to this for more perishable items such as meat, fish, dairy, fruit and vegetables which are ordered on a daily basis.

When the kitchen require stock from the bar for cooking a transfer needs to be completed as well as the bar and restaurant recording complimentary drinks, wastage due to line cleaning, mis-pouring of drinks and any breakages to have a record that can be included when completing stock take calculations.

Weekly stock checks on all items should be completed to ensure physical counts of actual stock match the records with a monthly formal stock take being completed to calculate profit margins. If stock is monitored in this way an annual independent stock take can still be used to inform annual accounts. Should the monthly stock take highlight any issues with shortages it will be easier to investigate and resolve.

My recommendations would be for all of the above to be implemented immediately and then for the following systems to be considered.

As the introduction of the two suggested systems will mean a significant difference in costs it is important to consider the long-term benefits and not just the initial cost.

System 1 – manual

A simple manual system can be set up using Excel or as paper-based and can include:

- bin cards for each item of stock which will record stock as it comes in as well as when it is used
- bin cards are often used for wines with the ‘bin no’ being referenced on the wine list, it can be labour-intensive if used for all stock items so it may be best to use just in the bar and restaurant.

An example of a bin card is below.

BIN CARD										
ITEM	ISSUING UNIT	DATE		RECEIVED FROM	ISSUED TO	PAR LEVEL		QUANTITY		BALANCE
		Received	Issued			Max	Min	In	Out	

- Daily stores issue sheet provides an itemised list of all stock items that are delivered and issued with the weekly stock totals, this could be used when the kitchen is issuing stock items to the kitchen and bar to monitor usage.

An example of a daily stores issue sheet is below.

DAILY STORES ISSUE SHEET																				
ITEM	UNIT	STOCK IN HAND	MON		TUE		WED		THUR		FRI		SAT		SUN		TOTAL PURCHASES	TOTAL ISSUES	TOTAL STOCK	
			In	Out	In	Out	In	Out	In	Out	In	Out	In	Out	In	Out				
Cream	2 litres	8		2		2	8	4		3		2	6	3		2	14	18	4	

- Stores Ledger is a more comprehensive document and generally in the form of a loose-leaf file and can be set up for different types of stock/departments and then listing individual items.

An example of a stores ledger is below.

STORES LEDGER SHEET												
DATE	DETAIL	INVOICE NO.	QUANTITY			UNIT PRICE	VALUE					
			Rec	Bal	Issued		Rec		Bal		Issued	

(Theory of Catering)

Departmental requisition books and transfer books can be used to record stock required by a department e.g. the items of fruit the bar require from the kitchen and the transfer book to be used when stock is transferred on department to another. This will ensure all stock can be traced and is recorded.

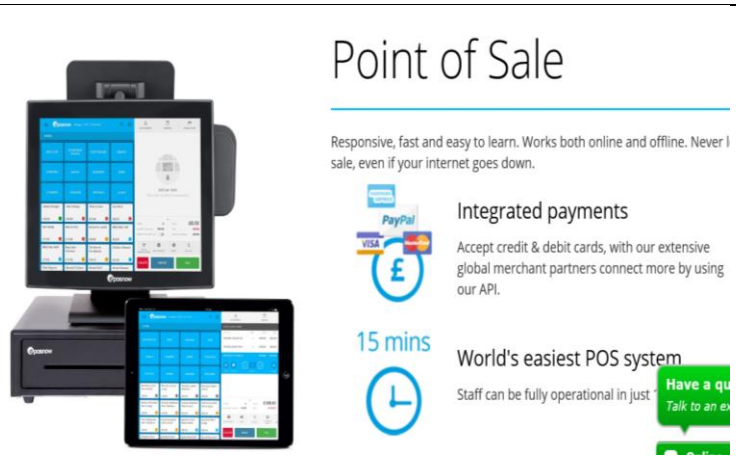
An order book can also be used to record orders being placed with suppliers and will detail:

- Suppliers name
- Date order placed
- Description of goods ordered
- Quantities
- Delivery date

It can also be used to check against delivery notes to ensure everything has been received.

System 2 – software package that is compatible with current system used for customer orders and billing.

The current system being used is EPOSNOW and they have a software package for stock control available with a 30 day free trial and it is priced at £25 per month plus £15 per additional till for a standard package or £50 per month plus £30 per additional till for the premium package. The differences in the packages are the support but as the restaurant already uses the system this could probably combined with the existing package.



(EPOS website)

The benefits of this software package for the restaurant as stated by EPOS are, '*Always have a complete awareness of your inventory levels, eliminating many unnecessary stock takes. Monitor your wastage and shrinkage, whilst ensuring you always have your best-selling products in stock.*
Streamline the stock ordering process by automatically raising purchase orders, and easily manage inter-location stock transfer'.

There are leasing options available with the company which would also spread the cost over a period of time and would enable upgrades in the future.

The software would:

- link recipe management and nutritional information
- automate administrative tasks and allow the restaurant to compare what it is buying, consuming and wasting with the budgets
- provide information on stock levels being held to avoid running out of items or holding too much stock
- allow the restaurant to set level alert if an item goes below a minimum stock level
- increase accuracy as data does not need to be re-entered onto different documents
- link usage to demand to track the costs with sales to identify best-selling items.
- limit access levels for managers and team members to protect company information and comply with Data Protection legislation.

Whilst the system software allows for links with suppliers for ordering that is currently not a requirement for the restaurant for the amount of stock being ordered and the type of suppliers being used.

There are options for the restaurant to access software hosted by suppliers who deliver it to users through the internet instead of having to maintain the applications themselves and are charged per usage on a monthly basis. This however may not be compatible with the sales system but it may be worth looking into.

My recommendation would be to trial the software package that is compatible with the current system used as the team are familiar with operating it and they should be able to quickly see the benefits. The managers can use the reports when discussing costs versus sales with the owners as well as using them to identify dead stock, shortages and overstocked items.
The owners will be able to access the system remotely if they require to see how the business is performing.

With the changes in practice being implemented immediately improvements should be seen within a month, this will include a reduction in waste due to staff having a greater awareness of their actions and so being more accountable; a streamlined ordering system with no duplicate stock being held; managers using accurate level of stock to inform ordering and costs being reduced.

The introduction of a new system will take a little longer but if the 30 day trial is organised for the computerised system then initial results should be available after the 30 days when a final decision can be made.

It is important that a time scale is set to see the improvements changing the systems and procedures for stock control and ordering will make so that the managers have hard evidence to present to the owners to support their case for purchasing the software package.

References

The Theory of Hospitality & Catering (Foskett, Paskins, Pennington)

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https://www.bighospitality.co.uk/News/Trends-Reports

https://www.nibusinessinfo.co.uk/content/stock-control-methods

https://possector.com/management/how-to-control-inventory-in-restaurant-or-bar

https://www.eposnow.com/uk/software

Owner – T. Baker
Bar Manager – J. Hampton
Restaurant Manager – V. Peek
Head Chef – G. Lock
Members of Kitchen team – S.Lane, T. Hood, D. Mann.
Members of the Restaurant team – A. Cooper, W. James, L.Knight.
Members of the Bar team – G.Knapp, O.Prior, E.Roberts.

Grading for the project

The apprentice has met the criteria for the pass grade with elements of the distinction, the criteria not met could be included in the professional discussion which would enable the distinction grade to be awarded. The criteria to expand on is:

- identified measurable improvements and benefits to the organisation
- reviewed the project to ensure it meets organisational and legal requirements
- provided detailed validation and justification of recommendations.

With regard to referencing research sources the candidate has listed the sources and attempted to apply references in the project demonstrating good practice for a level 3 apprentice and prepares them to progress to level 4.