

## **Annex A**

### **Bibliography**

'Investment decision making: a guide to good practice' (HEFCE 2003/17, April 2003)

'Facilities management – improving the management of support services in higher education' (HEFCE 00/14, March 2000)

'Guidance on the procurement of services' (Joint Procurement Policy and Strategy Group, Volumes 1 and 2, September 2000)

'Management information for decision making: costing guidelines for higher education institutions' (HEFCE M13/97, July 1997)

'Rewarding and developing staff in higher education: a guide to good practice in setting HR strategies' (HEFCE 02/14, March 2002)

'Risk management – a briefing for governors and senior managers' (HEFCE 01/24, April 2001) and 'Risk management – a guide to good practice for higher education institutions' (HEFCE 01/28, May 2001)

'Strategic planning in higher education – a guide for heads of institutions, senior managers and members of governing bodies' (HEFCE 00/24, June 2000)

'Whole life costing: a good practice guide' (Joint Procurement Policy and Strategy Group, August 1998)

## Annex B

### Useful references

Additional information to support continuous improvement processes within a catering service may be obtained from the following organisations:

**British Hospitality Association (BHA)**

[www.bha-online.org.uk](http://www.bha-online.org.uk)

**British Quality Foundation (BQF)**

[www.quality-foundation.co.uk/beta4/index.htm](http://www.quality-foundation.co.uk/beta4/index.htm)

**Caterer & Hotelkeeper**

[www.caterer.com](http://www.caterer.com)

**City & Guilds**

[www.city-and-guilds.co.uk](http://www.city-and-guilds.co.uk)

**Council for Hospitality Management Education**

C/o Professor Yvonne Guerrier

Southwark Campus

South Bank University

103 Borough Road

LONDON SE1 0AA

Tel 020 7815 8150

**European Catering Association**

[www.eca2.gh0.co.uk/](http://www.eca2.gh0.co.uk/)

**European Foundation for Quality Management (EFQM Excellence Model)**

[www.efqm.org/](http://www.efqm.org/)

<http://excellence.shu.ac.uk/model/actualmodel.asp>

**Foods Standards Agency**

[www.foodstandards.gov.uk](http://www.foodstandards.gov.uk)

**Hospitality Assured Standard for Service and Business Excellence**

The Brackens

London Road

ASCOT

SL5 8BG

Tel 01344 893857

**Hospitality Assured Meetings**

[www.meetings.org/ham/index.html](http://www.meetings.org/ham/index.html)

**Hospitality Training Foundation**

[www.htf.org.uk](http://www.htf.org.uk)

**Hotel and Catering International Management Association (HCIMA)**

[www.hcima.org.uk](http://www.hcima.org.uk)

**Investors in People UK**

[www.iipuk.co.uk](http://www.iipuk.co.uk)

**The Work Foundation (formerly The Industrial Society)**

[www.theworkfoundation.com/index.jsp](http://www.theworkfoundation.com/index.jsp)

**Institute for Continuing Professional Development**

[www.icpd.co.uk](http://www.icpd.co.uk)

**International Food Information Council**

<http://ific.org/>

**Meetings Industry Association (MIA)**

[www.meetings.org](http://www.meetings.org)

**Marketing Quality Assurance (MQA)**

The Brackens

London Road

ASCOT

SL5 8BG

Tel 01344 882400

**Scottish Qualifications Agency**

[www.sqa.org.uk](http://www.sqa.org.uk)

## Annex C

### Checklists and other resources

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	University of Birmingham	
	University of Edinburgh	
	University of Northumbria	
	Queen Mary, University of London	
	Sheffield Hallam University	
	UMIST	

# 1 Leadership and people

## Leadership – self-assessment checklist and score sheet

Self-assessment checklists are designed to be used periodically to measure catering services' operations. The objective is to achieve continuous improvement through the development and implementation of an action plan. When completing this checklist users should consider the following guidelines:

- a. To make the most effective use of this self-assessment checklist refer to section 1 in the main text of the toolchest, particularly the part about implementation.
- b. In recognising the barriers to scoring '4', it is important to identify those within catering services' control as opposed to those outside of catering services' control.
- c. It is important to document those identified barriers within any action plan to highlight issues which impede implementation of best practice.

In the areas of Leadership and People Management, most of the opportunities for improvement lie within the control of catering services, because the main focus of these areas is the inter-relationship between management and staff.

**Leadership – Self-assessment checklist**

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>1. Commitment</b>						
1.1	Do you know what the catering services' key performance results are and do you publish, measure and review these?					
<i>What do you assess? (Eg, staff costs, staff turnover, food costs)</i>						
<i>Points for action</i>						
1.2	Do you have a clear way of developing, communicating,					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
	reviewing and updating the catering services' plans?					
<i>How is this achieved? (Eg, regular performance reviews)</i>						
<i>Points for action</i>						
<b>2. Involvement</b>						
2.1	Do you communicate the aims and objectives to catering staff? (Eg, reports and business plans)					
<i>Points for action</i>						
2.2	Do you lead by example?					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<b>Points scored</b>
<i>How is this done? (Eg, do you 'walk and talk'; are you accessible to your staff – 'open door' policy; do you make regular visits to campus catering outlets and discuss issues and concerns with staff?)</i>						
<i>Points for action</i>						
2.3	Do you have ways of keeping your people informed of key performance indicators?					
<i>How is this done? (Eg, via newsletters, meetings, notice-boards, one to one meetings, personal plans)</i>						
<i>Points for action</i>						
<b>3. Motivation</b>						



		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
3.1	Do you assist employees to attain their personal targets and objectives?					
<i>How is this managed? (Eg, personal development plans and reviews)</i>						
<i>Points for action</i>						
3.2	Do you recognise individual and team performance?					
<i>How is this monitored? (Eg, performance bonus reward)</i>						
<i>Points for action</i>						
<b>4. Relationships</b>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
4.1	Are you able to develop a close relationship with stakeholders?					
<i>How is this achieved? (Eg, meetings and/or partnerships)</i>						
<i>Points for action</i>						
4.2	Do you meet with customers to discover and respond to their demands and needs? (Eg, questionnaires, focus groups, surveys)					
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>5. Continuous improvement</b>						
5.1	Do you have a systematic and clear way of managing processes in all areas?					
<i>How is this achieved? (Eg, standard procedure manuals, common standards)</i>						
<i>Points for action</i>						
5.2	In your opinion, do you act as a role model for excellence? (Eg, best practice, benchmarking with excellence models)					
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
5.3	Do you challenge existing procedures and develop alternatives?					
<i>How is this done? (Eg, review of outdated practices)</i>						
<i>Points for action</i>						

## Leadership – score sheet

Catering managers may find it useful to track the year on year progress achieved by their catering services under the self-assessment elements identified in the checklist.

	<b>Previous year</b>	<b>Current year</b>	<b>Supplementary notes, comments and actions</b>
	<i>Total points</i>	<i>Total points</i>	
<b>1. Commitment</b> (1.1 to 1.2)			
<b>2. Involvement</b> (2.1 to 2.3)			
<b>3. Motivation</b> (3.1 to 3.2)			
<b>4. Relationships</b> (4.1 to 4.2)			
<b>5. Continuous improvement</b> (5.1 to 5.3)			
<b>Totals</b>			

## People management – Self-assessment checklist and score sheet

Self-assessment checklists are designed to be used periodically to measure catering services' operations. The objective is to achieve continuous improvement through the development and implementation of an action plan. When completing this checklist users should consider the following guidelines:

- a. To make the most effective use of this self-assessment checklist refer to section 1 of the toolchest, particularly the part on implementation.
- b. In recognising the barriers to scoring '4', it is important to identify those within catering services' control as opposed to those outside of catering services' control.
- c. It is important to document those identified barriers within any action plan to highlight issues which impede implementation of best practice.

In the areas of People Management and Leadership, most of the opportunities for improvement lie within the control of catering services, because the main focus of these areas is the inter-relationship between management and staff.

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>1. Empowerment</b>						
1.1	Are employees supported and encouraged to contribute their ideas for the improvement of catering services?					
<i>How is this achieved?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<b>Points scored</b>
1.2	Are catering employees supported and encouraged to participate in improvement activities?					
<p><i>What arrangements are in place and are they effective? For example, are in-house meetings and ceremonies used to encourage involvement of people in continuous improvement?</i></p>						
<p><i>Points for action</i></p>						
1.3	Is a culture created within catering services whereby staff can exercise their initiative and take independent decisions?					
<p><i>Points for action</i></p>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
1.4	Does the catering service actively ensure that this increased empowerment is without significant risk to its services?					
<i>How is this done? Can the catering service demonstrate how it is ensuring that its employees are becoming increasingly empowered to act and take responsibility for decisions and changes?</i>						
<i>Points for action</i>						
1.5	Do employees recognise how far they are empowered to take action and make improvements/changes?					
<i>How is this achieved?</i>						
<i>Points for action</i>						



		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>2. Planning</b>						
2.1	Are strategies involving employees developed to align with overall catering policies and plans?					
<p><i>How effective are these arrangements? For example, are the employee strategies of catering services (eg, recruitment, training, development, disciplinary, terms and conditions) directly derived from the needs of its strategic plans and goals (rather than just activities or free-standing plans, based on ad hoc needs)?</i></p>						
<p><i>Points for action</i></p>						
2.2	Is people management reviewed and improved?					
<p><i>Points for action</i></p>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
2.3	Are the employee strategies of the institution at odds with the operational requirements of its catering services?					
<i>Points for action</i>						
2.4	In developing employee strategies, do you take into account the current and future needs of the catering service?					
<i>How often are these reviewed?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
2.5	Does the catering service identify the knowledge and competencies it requires for the business?					
<i>How do catering managers use that knowledge to develop plans to recruit and retain staff?</i>						
<i>Points for action</i>						
2.6	Is employee knowledge/expertise used systematically for the good of the business?					
<i>How is this managed?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
2.7	Does the catering service identify 'key expert employees'?					
<i>Points for action</i>						
2.8	Have the necessary skills and experiences been identified?					
<i>How are these attributes developed in line with business growth for catering services?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
2.9	Does the catering service have the flexibility to retain the key experts within its business?					
<i>How successful has the catering service been in achieving this to date?</i>						
<i>Points for action</i>						
<b>3. Communication</b>						
3.1	Would employees, if surveyed, agree that they are well informed and that their opinions are valued?					
<i>How are opinions obtained and considered? For example, Is there a communications policy?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
3.2	Does the culture of the catering service encourage employees to suggest improvements?					
<i>How are suggestions obtained and considered? To what extent have suggestions been successfully adopted/implemented to date?</i>						
<i>Points for action</i>						
3.3	Is information readily available to enable catering staff to do their job when they need it?					
<i>What information is available for catering staff? For example, staff handbooks (institutional and catering services), product information manuals, written procedures, opening times</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
3.4	Is this information accessible online by catering staff (to facilitate access, updating etc)?					
<i>Points for action</i>						
3.5	Is this information widely available and easily understood by catering staff?					
<i>How often is it reviewed and updated?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
3.6	Does the catering services' culture encourage good teamwork through open and constructive communication?					
<i>How is this assessed and reviewed?</i>						
<i>Points for action</i>						
3.7	Do catering services' plans include employee surveys, or other means of understanding employees' views?					
<i>Points for action</i>						



		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
3.8	Are there effective mechanisms for communicating bottom up, top down and across the catering service?					
<i>How is this achieved and are the mechanisms regularly reviewed and improved?</i>						
<i>Points for action</i>						
<b>4. Development</b>						
4.1	Are new approaches sought to improve the way that catering services' employees are managed?					
<i>What improvements have been adopted/implemented?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
4.2	Are regular performance reviews conducted?					
<i>Who undertakes such reviews and at what intervals?</i>						
<i>Points for action</i>						
4.3	Do catering employees have training and development plans that match their needs?					
<i>How is this achieved? Are these plans regularly reviewed and updated in consultation with catering employees? What suggestions have been successfully adopted/implemented for improving the creation of these plans?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
4.4	Do employees have an input/involvement in developing working practices?					
<i>What suggestions/improvements have been implemented?</i>						
<i>Points for action</i>						
4.5	Are employees' capabilities improved by providing them with learning opportunities?					
<i>What opportunities have been made available? Have these been successful?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
4.6	Are employees supported and encouraged to improve their performance?					
<i>What facilities have been made available? Have these been successful?</i>						
<i>Points for action</i>						
4.7	Are key experts developed and coached so that responsibilities are spread more widely?					
<i>How is this achieved? Has it been successful?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
4.8	Are employees developed with the business as it changes?					
<p><i>How has this been achieved? For example, are the following mechanisms used:</i></p> <ul style="list-style-type: none"> <li>• <i>succession planning?</i></li> <li>• <i>personnel policies – equal opportunities?</i></li> <li>• <i>re-grading opportunities?</i></li> </ul>						
<i>Points for action</i>						
<b>5. Reward and recognition</b>						
5.1	Are quality improvements implemented by catering staff recognised?					
<i>How is this achieved?</i>						
<i>Points for action</i>						

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
5.2	Are catering staff able to be rewarded?					
<i>In what ways? Has it been successful?</i>						
<i>Points for action</i>						
5.3	Are mechanisms in place to retain catering employees' loyalty?					
<i>In what ways? How successful have these been?</i>						
<i>Points for action</i>						

## People – score sheet

Catering managers may find it useful to track the year on year progress achieved by their catering services under the self-assessment elements identified in the checklist.

	<b>Previous year</b>	<b>Current year</b>	<b>Supplementary notes, comments and actions</b>
	<i>Total points</i>	<i>Total points</i>	
<b>1. Empowerment</b> (1.1 to 1.5)			
<b>2. Planning</b> (2.1 to 2.9)			
<b>3. Communication</b> (3.1 to 3.8)			
<b>4. Development</b> (4.1 to 4.8)			
<b>5. Reward and recognition</b> (5.1 to 5.3)			
<b>Totals</b>			

## 2 Policy and strategy – self-assessment checklist and score sheet

Self-assessment checklists are designed to be used periodically to measure catering services' operations. The objective is to achieve continuous improvement through the development and implementation of an action plan. When completing this checklist users should consider the following guidelines:

- a. To make the most effective use of this self-assessment checklist refer to section 2 of the toolchest and section 1 on implementation.
- b. In recognising the barriers to scoring '4', it is important to identify those within catering services' control as opposed to those outside of catering services' control.
- c. It is important to document those identified barriers within any action plan to highlight issues which impede implementation of best practice.

### Policy and strategy – self-assessment checklist

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>1. Strategic planning</b>						
1.1	Does the institution's overall strategic plan make specific reference to its catering services?					
1.2	Do the catering services within the institution have a catering strategy(ies) and a business plan(s)?					
1.3	How do the catering services' policies, strategy(ies) and business plan(s) link with the institution's strategic plan?					
1.4	Are the catering services' policies, strategy(ies) and business plan(s) regularly updated?					
<b>2. Strategic objectives</b>						
2.1	Has the institution identified how it will measure a successful catering service?					



		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<b>Points scored</b>
2.2	Have critical success factors, key to service delivery and operations, been identified by the institution and the catering services?					
2.3	<p>Do the catering services' policies, strategy(ies) and business plan(s) cover the following:</p> <ul style="list-style-type: none"> <li>• short to medium term objectives and targets?</li> <li>• risk management arrangements?</li> <li>• investment appraisal procedures?</li> <li>• revenue and capital budgets?</li> <li>• pricing mechanisms?</li> <li>• service level standards?</li> <li>• annual targets and key performance indicators?</li> <li>• contract specifications?</li> <li>• waste management?</li> <li>• staff training and development?</li> <li>• management information?</li> </ul>					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>3. Good management practice</b>						
3.1	Does the institution investigate how the best organisations provide their catering services?					
3.2	Have the catering services implemented any good management practices from organisations outside the higher education sector?					
3.3	Have the catering services used the EFQM Excellence Model, Hospitality Assured, IIP, ISO Quality Assurance or other model to assess their operations?					
<b>4. Management collaboration</b>						
4.1	Does the institution formally communicate changes that will impact on the catering services' policies, strategy(ies) and business plan(s)?					
4.2	Are the catering services able to react to short-term opportunities without adversely affecting their longer-term policies, strategy(ies) and business plan(s)?					
<b>5. Continuous improvement</b>						
5.1	Does the institution consider/review its arrangements with suppliers when making or revising the catering services' policies, strategy(ies) and business plan(s)?					
5.2	How do the catering services go about gathering information to update their policies, strategy(ies) and					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
	business plan(s)?					
5.3	Do the catering services ensure that they have up to date competitor information when setting or reviewing policies, strategy(ies) and business plan(s)?					
<b>6. Rewarding success/staff development</b>						
6.1	Are all catering staff covered by an annual appraisal process?					
6.2	Do the catering services regularly discuss their policies, strategy(ies) and business plan(s) with staff, for example, as part of a staff satisfaction survey?					
6.3	Do the catering services consider/act upon points raised by catering staff?					
6.4	Do the catering services ensure that catering staff have targets that will help achieve/deliver their policies, strategy(ies) and business plan(s)?					
6.5	Do the catering services ensure that all catering staff are up to date with environmental issues, eg, waste, re-cycling, energy savings and sustainability issues?					
6.6	Do the catering services ensure that all their staff are aware of technical developments that may benefit the services provided?					
6.7	Are training needs identified and assessed for all catering staff?					

## Policy and strategy – score sheet

Catering managers may find it useful to track the year on year progress achieved by their catering services under the self-assessment elements identified in the checklist.

	<b>Previous year</b>	<b>Current year</b>	<b>Supplementary notes, comments and actions</b>
	<i>Total points</i>	<i>Total points</i>	
<b>1. Strategic planning</b> (1.1 to 1.4)			
<b>2. Strategic objectives</b> (2.1 to 2.3)			
<b>3. Good management practice</b> (3.1 to 3.3)			
<b>4. Management collaboration</b> (4.1 to 4.2)			
<b>5. Continuous improvement</b> (5.1 to 5.3)			
<b>6. Rewarding success/staff development</b> (6.1 to 6.7)			
<b>Totals</b>			

### 3 Key performance results – self-assessment checklist and score sheet

Self-assessment checklists are designed to be used periodically to measure catering services' operations. The objective is to achieve continuous improvement through the development and implementation of an action plan. When completing this checklist users should consider the following guidelines:

- a. To make the most effective use of this self-assessment checklist refer to section 5 and section 1 on implementation .
- b. In recognising the barriers to scoring '4', it is important to identify those within catering services' control as opposed to those outside of catering services' control.
- c. It is important to document those identified barriers within any action plan to highlight issues which impede implementation of best practice.

#### Key performance results – self-assessment checklist

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>1. Performance indicators</b>						
1.1	Has the institution identified key performance indicators for all its catering services?					
1.2	Are these a part of its catering services' policies, strategy(ies) and business plan(s)?					
1.3	Do they enable catering services to be managed: <ul style="list-style-type: none"> <li>• globally (all managed cost centres/units)?</li> <li>• individually (per managed cost centre/unit)?</li> </ul>					
1.4	Are key performance indicators set for catering services within the annual budget plan?					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
1.5	Have peer HE institutions been identified for benchmarking catering services?					
1.6	Are catering services required to break even?					
<b>2. Income generation</b>						
2.1	Are investment funds made available for catering services to support new income streams?					
2.2	Have key income levels been identified within the overall catering services annual turnover?					
2.3	<p>Do key sources of income include the following (see also the Financial Trading Model, part 5 of this annex):</p> <ul style="list-style-type: none"> <li>• food (including café bars)?</li> <li>• bars (excluding café bars)?</li> <li>• student transfers (student meal plans – halls of residence)?</li> <li>• hospitality (internal)?</li> <li>• retail (shops)?</li> <li>• vending?</li> <li>• conference &amp; commercial?</li> </ul>					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
2.4	Are annual trends in total catering income reported to members of the senior management team?					
<b>3. Cost monitoring</b>						
3.1	Is the percentage to income analysed for the following cost headings (see also the Financial Trading Model, part 5 of this annex): <ul style="list-style-type: none"> <li>• food?</li> <li>• liquor?</li> <li>• labour (eg, split between food, liquor)?</li> <li>• All other costs (eg, vending costs)?</li> </ul>					
3.2	Are costs matched against income as part of a financial trading model (see the Financial Trading Model, part 5 of this annex)?					
3.3	Are other costs analysed for the following expenditure headings (see also the Financial Trading Model, part 5 of this annex): <ul style="list-style-type: none"> <li>• disposables?</li> <li>• utilities (energy)?</li> <li>• furniture?</li> </ul>					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<b>Points scored</b>
	<ul style="list-style-type: none"> <li>• capital equipment?</li> <li>• catering maintenance?</li> <li>• estates maintenance?</li> <li>• space charge?</li> <li>• training?</li> <li>• finance?</li> <li>• personnel?</li> <li>• security?</li> <li>• departmental administration?</li> <li>• depreciation?</li> </ul>					
<b>4. Pricing policies</b>						
4.1	Are price changes determined?					
4.2	Does the institution have an approved pricing strategy for all catering services?					
4.3	Is the pricing strategy determined in consultation with catering service managers?					
4.4	Are prices updated often?					
4.5	Are prices adjusted in exceptional circumstances?					



		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>5. Management information and technology</b>						
5.1	Do catering systems enable management information to be 'shared'?					
5.2	Do catering managers have access to sector related databases, eg, EMS, CUBO?					
5.3	Does the institution invest in up to date technology to support its catering services?					
5.4	Do catering services have effective electronic point of sale, cashless payment methods, eg, smart cards, computerised stock control?					
<b>6. Staffing</b>						
6.1	Are staff attendance/absence records kept?					
6.2	Are these computerised or manual?					
6.3	Is staff attendance/absence (both notified and non-authorised) measured?					
6.4	Are staff recruitment, vacancy and retention rates monitored and reported per catering FTE?					
6.5	Are recruitment and retention policies updated?					
6.6	Are the conditions and terms of employment for catering staff determined?					

		<b>Not at all</b> (Score 1 point)	<b>Sometimes</b> (Score 2 points)	<b>Often</b> (Score 3 points)	<b>Always</b> (Score 4 points)	<i>Points scored</i>
<b>7. Service standards</b>						
7.1	Are quality service standards determined and updated?					
7.2	Have catering services achieved nationally recognised awards (such as Hospitality Assured, Investors in People, ISO Quality Assurance)?					
7.3	Have key performance indicators/results (KPI/KPR) been established to support quality initiatives and improvements in the catering services?					

## Key performance results – score sheet

Catering managers may find it useful to track the year on year progress achieved by their catering services under the self-assessment elements identified in the checklist.

	<b>Previous year</b>	<b>Current year</b>	<b>Supplementary notes, comments and actions</b>
	<i>Total points</i>	<i>Total points</i>	
<b>1. Performance indicators (1.1 to 1.6)</b>			
<b>2. Income generation (2.1 to 2.4)</b>			
<b>3. Cost monitoring (3.1 to 3.3)</b>			
<b>4. Pricing policies (4.1 to 4.5)</b>			
<b>5. Management information and technology (5.1 to 5.4)</b>			

	<b>Previous year</b>	<b>Current year</b>	<b>Supplementary notes, comments and actions</b>
	<i>Total points</i>	<i>Total points</i>	
<b>6. Staffing (6.1 to 6.6)</b>			
<b>7. Service standards (7.1 to 7.3)</b>			
<b>Totals</b>			

## 4 Income and gross profit ratios

The following data were obtained from the questionnaires returned by participating higher education institutions.

### 1. Sources of income: Percentage of annual income

	Turnover up to £1 million		Turnover between £1 million and £3 million		Turnover £3 million plus	
	Range	Mode	Range	Mode	Range	Mode
Food	24 – 81%	40%	0 – 78%	43%	0 – 80%	N/A
Student meals (transfers)	0 – 54%	0%	0 – 70%	0%	0 – 53%	0%
Conference/commercial	4 – 45%	20%	0 – 53%	2%	0 – 40%	12%
Hospitality	1 – 30%	10%	0 – 29%	10%	0 – 26%	10%
Bars	0 – 19%	0%	0 – 18%	0%	0 – 28%	0%
Retail	0 – 25%	0%	0 – 14%	0%	0 – 19%	0%
Vending	0 – 12%	2%	0 – 13%	2%	0 – 10%	2%
Other income*	0 – 3%	0%	0 – 100%	0%	0 – 25%	0%

\* Includes supply discounts, rental of equipment and so on

### 2. Gross profit percentage in respect of food, liquor, labour and other costs

*Up to £1 million turnover:*

Food	20 – 60%
Liquor	48 – 51%
Labour	25 – 53%
Other costs	8 – 77%

*Between £1 million and £3 million turnover:*

Food	43 – 65%
Liquor	30 – 75%
Labour	28 – 61%
Other costs	6 – 60%

*Over £3 million turnover:*

Food	24 – 65%
Liquor	50 – 65%
Labour	31 – 57%
Other costs	10 – 64%

## 5 Financial trading model – catering services

Catering managers may find the financial trading model helpful when determining the different costs to be recovered (or otherwise) by catering services' operations.

### INCOME (ex VAT)

Food sales

Bar sales

Vending

External functions

Conferences

Other

### TOTAL INCOME

### Detail

Can break down further into separate retail items

Would be cash from machines and royalties

Day events may have sub headings for food, bar, other etc

Would be the food, bar and other elements of an event

Catchall

### VARIABLE EXPENDITURE

Expect most trading operations to work to cover these costs and contribute towards fixed expenditure

Salaries & wages – kitchen & dining

Salaries & wages – bar

Food cost

Bar cost

Vending cost

Cleaning materials

Laundry & uniforms

Disposables

Other expenses

### TOTAL VARIABLE EXPENSES

Could be broken down further to separate out retail eg, confectionery

Materials

Materials

Materials

Catchall – could be phones and travel etc

### GROSS PROFIT

### FIXED EXPENDITURE

\*These costs would normally be met from the gross profit

Salaries – office & managerial\*

Repairs & renewals\*

Training\*

Capital\*

Loan interest\*

Miscellaneous\*

Rents & rates\*\*

\*\* These costs would usually only be set against operations in the upper income levels

Heat/light/water\*\*

Very variable maybe actual or a contribution

Administration/insurance\*\*

Depreciation\*\*

### TOTAL FIXED COSTS

These vary within the three income groups - depending on what fixed costs can be set against the catering trading account

### NET PROFIT

If achieved, could be used for inward investment

## 6 Catering business formulae

### FOOD

$\frac{\text{income from food} - \text{cost of food}}{\text{income from food}} \times 100\%$

\*income from food

$\frac{\text{income from food}}{\text{total turnover}} \times 100\%$

\*\*total turnover

### LIQUOR

$\frac{\text{income from liquor} - \text{cost of liquor}}{\text{income from liquor}} \times 100\%$

\*income from liquor

$\frac{\text{income from liquor}}{\text{total turnover}} \times 100\%$

\*\*total turnover

### VENDING

$\frac{\text{income from vending} - \text{cost of vending}}{\text{income from vending}} \times 100\%$

\*income from vending

$\frac{\text{income from vending}}{\text{total turnover}} \times 100\%$

\*\*total turnover

### LABOUR (SALARIES AND WAGES)

$\frac{\text{cost of labour (food)}}{\text{income (food)}} \times 100\%$  Separate % could also be determined for liquor, conferences etc

\*income (food)

$\frac{\text{total cost of labour}}{\text{total turnover}} \times 100\%$

\*total turnover

### COSTS – VARIABLE AND FIXED

$\frac{\text{variable costs (liquor)}}{\text{income (liquor)}} \times 100\%$  Separate % could also be determined for food, conferences etc

\*income (liquor)

$\frac{\text{total variable costs}}{\text{total turnover}} \times 100\%$

\*\*total turnover

$\frac{\text{fixed costs (conferences)}}{\text{income (conferences)}} \times 100\%$  Separate % could also be determined for food, liquor etc

\*income (conferences)

$\frac{\text{total fixed costs}}{\text{total turnover}} \times 100\%$

\*\*total turnover

\* Income – from food, liquor, conferences etc

\*\* Total turnover – gross income from all catering services

## **7 The Hospitality Assured current standard for service and business excellence**

(An institution may wish to adapt the following service standard for its catering and other services.)

### **1. Customer research**

The organisation defines customer requirements as a result of the continuous gathering and evaluation of information relating to market needs and competitive activity.

The standard requires that the organisation shall:

- 1.1 Have a clear picture of who its customers are and where they come from
- 1.2 Know who its competitors are and what they are doing to enable comparison and improvement
- 1.3 Have defined methods of continually gathering and evaluating information about its customer needs and the way this impacts on the services provided
- 1.4 Evaluate market and economic information to define existing and future market sectors

### **2. The customer promise**

The organisation has a clear understanding of the overall customer promise and standards that it intends to deliver and communicates these to customers and employees.

The standard requires that the organisation shall:

- 2.1 Have a policy that identifies the products and standards of service it intends to offer its customers including terms and conditions
- 2.2 Define and communicate its service promise to its customers
- 2.3 Communicate its service promise and standards of service to all people
- 2.4 Design, develop and deliver its products and services, based on customers' needs and expectations

### **3. Business planning**

The organisation has a business plan that contains clear policies and strategies, which are consistent with its vision, mission and values.

The standard requires that the organisation shall:

- 3.1 Implement a business plan that contains clear objectives and goals
- 3.2 Have measures to review its achievement against the business plan
- 3.3 Set marketing, financial and customer service objectives/targets
- 3.4 Include customer and stakeholder requirements in the business plan
- 3.5 Use customer feedback to monitor progress against the business plan
- 3.6 Set clear human resource, people training and development objectives/targets

### **4. Operational planning**

The organisation has a plan that identifies how the customer service promise is to be delivered:

The standard requires that the organisation shall:



- 4.1 Have a plan that identifies key people responsibilities for the delivery of service
- 4.2 Communicate these responsibilities to all people as appropriate
- 4.3 Evaluate the plan to identify critical stages in the delivery of the services and their resource implications
- 4.4 Develop procedures for ensuring that purchased products and services meet its service promise
- 4.5 Identify and manage key partnerships

## **5. Standards of performance**

The organisation has established procedures and standards of performance to ensure that its customer service promise is met.

The standard requires that the organisation shall:

- 5.1 Design and maintain suitable procedures and standards of performance to ensure that the customer service promise is met through a framework of key processes
- 5.2 Make people aware of its customer service procedures and standards of performance
- 5.3 Define who is responsible for issuing, reviewing and revising these procedures and standards
- 5.4 Implement procedures and standards of performance to comply with current legal, health, safety and environmental regulations
- 5.5 Provide leadership which demonstrates and encourages high standards of service performance and a culture of excellence

## **6. Resources**

The organisation demonstrates that sufficient resources exist to deliver its customer service promise.

The standard requires that the organisation shall:

- 6.1 Have procedures for identifying its people, equipment and facilities resource requirements
- 6.2 Make adequate resources available to deliver the standards of service promised to the customer
- 6.3 Manage and use appropriate technology to support improvement
- 6.4 Manage finances, buildings, equipment and materials to maintain delivery of the service promise

## **7. Training and development**

The organisation engages in training and development activities that equip its people with the necessary skills, competence and understanding to deliver its service promise.

The standard requires that the organisation shall:

- 7.1 Equip its people with the skills and knowledge to provide the service promised to the customer
- 7.2 Review individual people and management performance to identify and agree any training or support required to ensure that current and future needs are met
- 7.3 Have measures in place to identify and improve performance and people's perception of their job satisfaction, motivation and development opportunities
- 7.4 Evaluate the effectiveness of training and development activities
- 7.5 Involve and empower its people to encourage innovation, improvement and creativity

## **8. Service delivery**

The organisation checks that the service promised to the customer is properly and consistently delivered.

The standard requires that the organisation shall:

- 8.1 Demonstrate how service performance is measured and assessed to ensure that the service promise is being delivered
- 8.2 Maintain processes for checking that the service promised to the customer is delivered
- 8.3 Maintain records to demonstrate best practice in conformance with current legal, health, safety and environmental regulations
- 8.4 Maintain a process to measure customers' perception of the effectiveness of the service and their satisfaction
- 8.5 Demonstrate that it achieves its customer satisfaction targets
- 8.6 Provide appropriate feedback and recognition on individual, team and organisation performance in delivering the service promise to the customer
- 8.7 Stimulate and encourage collaboration and team effort in the delivery of service excellence
- 8.8 Have measures in place to identify and improve performance and society's perception of the organisation

## **9. Service recovery**

The organisation ensures that it is aware of and responds to service problems and customer feedback making improvements where necessary.

The standard requires that the organisation shall:

- 9.1 Have a procedure for taking early action to correct poor service delivery
- 9.2 Record customer complaints, comments and requests and ensure that corrective action is taken
- 9.3 Have a process in place to keep customers regularly informed of progress relating to their complaints, comments and requests
- 9.4 Take the necessary action to identify the source of any problems and to correct problems in such a manner as to prevent their recurrence

## **10. Customer satisfaction improvement**

The organisation reviews the effectiveness of its service delivery and appropriateness of its service promise to ensure that it continues to deliver service excellence.

The standard requires that the organisation shall:

- 10.1 Regularly review its service promise to confirm that it continues to meet customer needs and expectations
- 10.2 Review and improve the effectiveness of all its procedures and processes that deliver the service promise
- 10.3 Seek suggestions for improvement from customers, shareholders, suppliers and people and implement them as appropriate
- 10.4 Seek opportunities to benchmark and identify best practice within its industry sector

## **11. Costs**

11. The initial cost of Hospitality Assured is £6,250, and subsequent costs (renewal) amount to around £3,750.



3	<p>Does the catering policy/business plan include any of the following:</p> <ul style="list-style-type: none"> <li>• pricing mechanisms</li> <li>• short to medium term objectives and targets</li> <li>• annual performance indicators</li> <li>• service level standards</li> <li>• reporting information to senior management</li> <li>• staff training</li> <li>• waste management</li> <li>• contract specifications</li> <li>• additional – please specify: .....</li> <li>.....</li> <li>.....</li> <li>.....</li> <li>.....</li> </ul>	Yes	No	Sometimes
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Does the institution investigate how the best organisations provide their catering services?	Yes	No	Sometimes
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Have your catering services implemented any good management practices from organisations outside the sector?	Yes	No	Sometimes
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	Does the institution consider/review its arrangements with suppliers when making or revising the catering services plans?	Yes	No	Sometimes
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	How do the catering services go about gathering information to update its catering plans? Please indicate briefly: .....			
	.....			
	.....			
	.....			
	.....			
8	Are the catering services policies and plans periodically reviewed and revised?	Yes	No	Sometimes
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9	Do the catering services regularly discuss catering plans with staff, for example, as part of a staff satisfaction survey?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
10	Does the catering services consider/act upon points raised by catering staff?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
11	Do the catering services ensure that they have up to date competitor information when setting or reviewing catering plans?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
12	Do the catering services ensure that catering staff have targets that will help achieve catering plans?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
13	Has the institution identified how it will measure a successful catering service?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
14	Do the catering services react to short-term opportunities in relation to their longer-term plans?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
15	Does your institution formally communicate changes that will impact on your catering services' business plans?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
16	Do the catering services ensure that all catering staff are up to date with environmental issues, eg, re-cycling, green issues, energy?	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>
17	Do the catering services ensure that all catering staff are aware of technical developments that may benefit their catering services?  Please give examples: ..... ..... .....	Yes <input type="checkbox"/>	No <input type="checkbox"/>	Sometimes <input type="checkbox"/>



## 9 Key performance results questionnaire – catering services

Name of institution: .....

<b>Contact name:</b> .....
Job title: .....
Tel: ..... Email: .....
Main responsibilities (brief description): ..... ..... ..... .....

Please note – all information should be based on financial year 2000-01

1	Do you set financial targets: (Please tick) a) Globally (ie, for all managed cost centres/units)?  b) Per individual managed cost centre/unit?  c) Did you achieve your budget in 2000-01?	Yes	No
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
2	How is income made up in percentage terms? (Please indicate) a) Vending?  b) Conference and commercial?  c) Student transfers (student meal plans – halls of residence)?  d) Retail (shops)?  e) Food (including café bars)?  f) Hospitality (internal)?	<div style="border: 1px solid black; width: 60px; height: 25px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>	
		<div style="border: 1px solid black; width: 60px; height: 25px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>	
		<div style="border: 1px solid black; width: 60px; height: 25px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>	
		<div style="border: 1px solid black; width: 60px; height: 25px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>	
		<div style="border: 1px solid black; width: 60px; height: 25px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>	
		<div style="border: 1px solid black; width: 60px; height: 25px; margin: 0 auto; display: flex; align-items: center; justify-content: center;">%</div>	

2	<p>How is income made up in percentage terms? (Please indicate) (continued)</p> <p>g) Bars (excluding café bars)?</p> <p>h) Other income? (Please specify):</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>i) Unable to comment/provide information on (a) to (h) above? (Please tick, if applicable)</p>	<p><input type="text"/> %</p> <p><input type="text"/> %</p> <p><input type="text"/></p>								
3	<p>Total catering income for 2000-01: (Please indicate)</p> <p>a) Up to £1 million?</p> <p>b) Over £1 million up to £2 million?</p> <p>c) Over £2 million up to £3 million?</p> <p>d) Over £3 million up to £4 million?</p> <p>e) Over £4 million?</p>	<p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p> <p><input type="text"/></p>								
4	<p>What is the percentage of cost to income for:</p> <p>a) Food?</p> <p>b) Liquor?</p> <p>c) Labour?</p> <p>d) All other costs?</p>	<p><input type="text"/> %</p> <p><input type="text"/> %</p> <p><input type="text"/> %</p> <p><input type="text"/> %</p>								
5	<p>Which of the following are included in all other costs for 2000-01: (Please indicate)</p> <p>a) Disposables?</p> <p>b) Utilities (energy)?</p> <p>c) Furniture?</p>	<table border="0"> <tr> <td>Yes</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	Yes	No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Yes	No									
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									
<input type="checkbox"/>	<input type="checkbox"/>									



5	<p>Which of the following are included in all other costs for 2000-01: (Please indicate) (continued)</p> <p>d) Capital equipment? <input type="checkbox"/></p> <p>e) Catering maintenance? <input type="checkbox"/></p> <p>f) Estates maintenance? <input type="checkbox"/></p> <p>g) Space charge? <input type="checkbox"/></p> <p>h) Training? <input type="checkbox"/></p> <p>i) Finance? <input type="checkbox"/></p> <p>j) Personnel? <input type="checkbox"/></p> <p>k) Security? <input type="checkbox"/></p> <p>l) Departmental administration? <input type="checkbox"/></p> <p>m) Depreciation? <input type="checkbox"/></p> <p>n) Other expenditure? – please specify: <input type="checkbox"/></p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	Yes	No
6	Do you have a pricing strategy?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
7	<p>Is the pricing strategy determined by (Please indicate – you may tick more than one box):</p> <p>a) The institution? <input type="checkbox"/></p> <p>b) Senior catering services management? <input type="checkbox"/></p> <p>c) Unit catering managers? <input type="checkbox"/></p>	Yes	No

7	<p>Is the pricing strategy determined by (Please indicate – you may tick more than one box) (continued):</p> <p>d) Other arrangements/processes? – please specify</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes      No</p> <p><input type="checkbox"/>      <input type="checkbox"/></p>
8	<p>How often are prices updated:</p> <p>a) Annually?</p> <p>b) Termly/per semester?</p> <p>c) More often than the above?</p>	<p>Yes      No</p> <p><input type="checkbox"/>      <input type="checkbox"/></p> <p><input type="checkbox"/>      <input type="checkbox"/></p> <p><input type="checkbox"/>      <input type="checkbox"/></p>
9	<p>Are you able to adjust the pricing structure in exceptional circumstances (eg, foot &amp; mouth; potato crisis)?</p>	<p>Yes      No</p> <p><input type="checkbox"/>      <input type="checkbox"/></p>
10	<p>Pricing – changes are determined by:</p> <p>a) Cost price plus percentage uplift?</p> <p>b) Marketplace (ie, to reflect market research, 'high street' factors, etc)</p> <p>c) Other factors/methods – please specify</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Yes      No</p> <p><input type="checkbox"/>      <input type="checkbox"/></p> <p><input type="checkbox"/>      <input type="checkbox"/></p> <p><input type="checkbox"/>      <input type="checkbox"/></p>
11	<p>Is an annual percentage rate of staff turnover (per FTE) available?</p> <p>If Yes, please state the percentage for 2000-01 for:</p> <p>a) Managers?</p> <p>b) Manual staff?</p>	<p>Yes      No</p> <p><input type="checkbox"/>      <input type="checkbox"/></p> <p><input type="text"/> %</p> <p><input type="text"/> %</p>

12	<p>Are staff attendance/absence records kept?</p> <p>If Yes, are the records:</p> <p>a) Computerised?</p> <p>b) Manual?</p>	<table border="0"> <tr> <td>Yes</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	Yes	No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
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13	<p>Is staff attendance/absence (both notified and non-authorized) measured?</p> <p>If Yes, please give the total number of days absent for each staff category for 2000-01:</p> <p>a) Managers?</p> <p>b) Manual staff?</p>	<table border="0"> <tr> <td>Yes</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td style="text-align: center;"> <div style="border: 1px solid black; padding: 2px 10px;">days</div> </td> </tr> <tr> <td></td> <td style="text-align: center;"> <div style="border: 1px solid black; padding: 2px 10px;">days</div> </td> </tr> </table>	Yes	No	<input type="checkbox"/>	<input type="checkbox"/>		<div style="border: 1px solid black; padding: 2px 10px;">days</div>		<div style="border: 1px solid black; padding: 2px 10px;">days</div>		
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14	<p>Have you achieved, or is the institution seeking to achieve, any of the following awards:</p> <p>a) Hospitality Assured?</p> <p>b) Investors in People (IIP)?</p> <p>c) Quality assurance (ISO)?</p> <p>d) Other awards? Please specify:</p> <p>.....</p> <p>.....</p>	<table border="0"> <tr> <td>Yes</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	Yes	No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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15	<p>Do you employ up to date technology to support catering services?</p> <p>a) For example, do you have electronic point of sale (EPOS)?</p> <p>b) Do you use smart cards as a method of 'cashless' payment?</p> <p>If YES, please state which cashless systems you use?</p> <p>.....</p> <p>.....</p>	<table border="0"> <tr> <td>Yes</td> <td>No</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </table>	Yes	No	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
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## 10 Cameos

### University of Birmingham: University Catering Charter

This Charter establishes what services are available from University Catering and our commitment to our customers.

#### Service Locations

The catering service is provided at the following locations from Monday to Friday (outside these times by prior arrangement). The opening hours may change without notice. Any changes will be clearly displayed.

#### Avanti Restaurant - University Centre

A 164 seat fast food restaurant, offering a wide range of food including pizza/pasta deli-bar, salad bar and traditional fayre. A variety of hot and cold beverages is also available all at competitive prices for staff and students.

**Term time:** 08.00 - 17.30

**Vacation:** 09.00 - 16.00

All No Smoking. These hours may change without notice. Any changes will be clearly displayed.

#### Go – University Centre

Takeaway facility providing a wide range of sandwiches, pastries, confectionery and speciality coffees. This unit is also open on a Saturday.

**Term time:** 08.00 - 17.30

**Vacation:** 09.00 - 15.00

#### Cafe Go – University Centre

A popular Deli Cafe, offering a wide range of, handmade sandwiches made to order, jacket potatoes, speciality coffees, chilled drinks and confectionery.

**Term time:** 08.00 - 17.30

**Vacation:** 09.00 - 16.00

**Saturdays:** 10.00 - 15.00

All No Smoking.

#### Go2 -Teaching Resource Centre

A takeaway facility offering speciality coffees and a limited selection of sandwiches and confectionery.

**Term time:** 08.00 – 17.30

**Vacation:** 10.00 - 14.00

#### Food for Thought

A catering delivery service which provides a wide variety of catering to Schools and Departments throughout the day, by prior arrangement. Please ring extension 42834.

#### Suppliers

We undertake to purchase all our food from reputable suppliers who meet all appropriate food safety standards. All food will be purchased competitively on a value for money basis.

#### Staff

All our staff will be helpful and courteous to customers and appropriately trained for their duties. Staff will observe the requirements of the food safety policies. We will operate staff rotas to cater for peak demands and limit queues.

#### Menus

All menus will be regularly reviewed and be appropriate for the service provided and season of the year. We will always offer a variety of hot and cold food at each of our outlets and ensure that a vegetarian choice is available.

We will, as far as is practical, meet special dietary requirements if we are given adequate notice, please speak with our trained staff.

#### Charges

We operate on a Trading Account basis and shall always aim to provide good value for money consistent with our trading criteria.

Prices for all products (with some exceptions for confectionery) will be clearly displayed at points of service for cash sales.

**Medical School**

Takeaway facility providing a wide range of sandwiches, pastries, confectionery and speciality coffees.

**Term time:** 08.30 - 16.30

**Vacation:** 09.00 - 15.00

All No Smoking.

**Chicken Joe's at Hole in the Wall - Underneath Staff House**

A takeaway facility providing halal kebabs and hot and cold drinks, confectionery and beverages.

**Term time:** 10.30-15.00

**Vacation:** 11.00-14.00

**Physics Coffee Lounge - Poynting Physics Building**

Providing beverages and a variety of snacks. Vending machines available outside these times.

**Term time:** 10.00-16.15 (closed 14.00-15.00),

**Vacation:** 10.00.14.00

**Cafe Rendezvous – Westhill**

A 160 seat restaurant offering a wide range of hot and cold food and hot and cold beverages. The area is also open for continental breakfast. Available for functions outside lunchtime.

**Term time:** 9.00. 14.30

**Vending operation:** 9.00 -21.00

**The Shop – Westhill**

**Term time:** 9.00 -14.00

(These hours may vary according to business levels in vacation.)

All purchases by staff and visitors are subject to VAT. Students, on presentation of their ID cards, are exempt from VAT on food category items only.

**Premises Cleanliness and Safety**

We shall keep all our areas in a clean and tidy condition subject to the needs of our operation. All preparation; storage and cooking areas will be maintained to food safety standards.

Any spillage will be actioned immediately to avoid danger to customers.

**Further Information**

Policy and procedures which confirm our commitment to you can be seen on request in the Manager's office by arrangement. These include our Food Safety Policy, Health and Safety Policy and Procedures, Service Level Statements, etc.

**Complaints**

If you have a complaint which you raise verbally it will receive action by a member of our management team within 10 minutes.

All written complaints should be addressed to The Catering Operations Manager, Staff House and we undertake to reply within 5 working days. The Catering Operations Manager can also be contacted through extension 42750 during normal working hours.

If you are dissatisfied with the response to a complaint then the Director of University Catering will arbitrate on your behalf.

**Redress**

Where a complaint is upheld you will receive compensation to the value of the price paid. This does not affect your Statutory Rights.

## **University of Edinburgh: Customer Satisfaction Measures**

Customer Satisfaction is one of four types of performance measure used at the University of Edinburgh, Accommodation Services. Other measures are Financial, Human Resource measures, and Process measures such as speed of service delivery and response to enquiries. The annual planning process begins with a 'self-assessment' exercise using the principles of the European Business Excellence Model to measure ongoing organisational improvements against a number of established business performance criteria. The planning process then goes on to examine the Department's mission statement and its linkage with the University's mission and strategic objectives.

Customer Satisfaction measures are then set to support the main institutional objective of providing an 'outstanding educational environment'.

A number of different measurement mechanisms are deployed to gather quantitative and qualitative feedback from both student customers and commercial customers. These include regular student surveys which cover all services delivered, localised business unit satisfaction surveys, focus groups to gather qualitative feedback and test the results of quantitative analysis, and 'listening hours' where students can talk to members of the Department's senior management team about specific problems and concerns.

For commercial customers, group and event organisers are contacted by an external company who use telephone questionnaires to examine and measure performance against a variety of criteria from the initial enquiry response through to invoice accuracy. This information is supplemented by individual delegate and visitor questionnaires which can be deposited in specially designed mailboxes or mailed back, by freepost, to the independent company contracted to provide the feedback analysis. Regular customer research by telephone and in customer workshops helps to identify the priorities for change to commercial products and services and reviews the relevance of the satisfaction measures used. In addition, mystery shoppers test the Department's response to enquiries via a variety of media from telephone through to web-based enquiry forms.

Targets are set across a range of customer measures and are reported against at regular management meetings, using a pro-forma, which shows target against current performance and uses the qualitative feedback obtained to establish 'customer driven' improvement actions. Departmental objectives and performance measures are discussed with staff at every level of the organisation and are communicated and recorded via simple, one page pro-formas which all employees sign for and which provide the basis for regular performance reviews.



## **Northumbria University: The Pricing Process**

### **Performance Indicators**

Each of the catering units within the Catering Service have, as one of their performance indicators, a targeted Gross Profit Percentage (GP%) to achieve each financial year.

These GP%'s are determined by the historical performance of the indicator, sales mix, customer profile and any other factors, which may be considered to exert an influence. One of which would be the absorption of any short-term unexpected price rises i.e. Coffee (International Pricing) Meat (Foot & Mouth)

Each unit manager is responsible for maintaining the levels of performance. These are measured every three to four weeks as determined by the stocktaking schedule, which feeds into the Trading Statement. The differences in GP% relate strongly to the sales mix of each unit.

### **Pricing Structure**

#### **a) Annual Review**

A list of core items which are sold throughout the Catering Service are reviewed annually, with any price changes scheduled to be implemented for the beginning of September. Exceptions to this are when market prices take a dramatic turn upwards for a sustained period and the service can no longer absorb the additional costs involved. A good example of this occurred when potato prices rose one year, coffee in another.

The level of expenditure set against the Catering Service in the annual Estimates also determines the proposed price increase. The decision to increase these core items is made after reviewing customer price sensitivity and the need to cover allocated costs other than food cost. Account is also taken of volume of sales for the core items, competitors' pricing and benchmarking against retail prices with some items. Account is also taken of the desire to increase in multiples of 5p.

The list is agreed within the Catering Service and is implemented usually at the beginning of September. There have been occasions when the prices have not increased; 2001 for example, saw the first increase in two years for most items.

#### **b) Unit Review**

The Catering Service does not operate a standard menu cycle across the board. Unit managers determine with their staff, menu content and price. Some items will be sold at a lower margin than the designated performance GP%, usually because the item is expected to be on offer and because the customer is also particularly price sensitive.

Catering managers will therefore balance their menu content with other items which will give a greater return than the designated performance GP%, at a price which is acceptable to customers and which subsidises popular loss leaders.

Catering managers are expected to be adept at this menu/price balancing and their performance is reviewed against the Trading Statement results.

Customer expectation and the culture to which they are accustomed are also taken into consideration. A particular difficulty faced at Coach Lane is the subsidised food service which part-time Education and Health students enjoy when they are either on placement or they experience whilst at work, a situation which we are unable to compete with yet are expected to respond to.

### **Conference Pricing**

A further annual review takes place to determine the pricing structure of conference catering. This is agreed initially between the Conference Manager and the University Catering Manager. Subject to the overall agreement of the Director.

## **Hospitality Pricing**

This is a particularly price sensitive area, and in the last twelve months the hospitality offer has been based round a pricing structure rather than a content structure. The customer is advised on the number and type of menu item but is unaware of the specific content. Customer specific needs can be catered for without difficulty.

We have found that this has worked quite effectively for the last twelve months and has resulted in fewer adverse comments regarding menu fatigue and flexibility.

The conference pricing structure is linked to the hospitality pricing structure to allow for consistency of approach, as the conference office deals with both internal and external customers. Hospitality prices are again reviewed annually, sometimes with minimum increases.

## **Purchasing Policy**

The requirement to purchase effectively and sensibly is the subject of a great number of debates. The effectiveness of national contracts through organisations such as NEUPG and TUCO at unit level has mixed benefits. Opportunities to purchase as groups within the region similarly do not always suit particular requirements. This was particularly evident when we joined a regional consortium for the purchase of meat, using a sole supplier instead of two nominated suppliers. Due to weak contract management and an ill placed commitment the contract pricing structure adversely affected potential GP% targets. These price discrepancies were absorbed within the Catering Service and not passed onto customers.

*The need for effective purchasing agreements, which are flexible and manageable, is very important and is currently being reviewed in light of recent experiences. It should be appreciated that for every £1 expenditure on food/drink commodities the selling price for a 60% GP% to be achieved will need to be £2.50. Items such as confectionery, canned drinks and milk will never achieve a full GP% due to price sensitivity.*

## **Service Levels**

Appreciation of the service expected from the university as a whole and departments specifically influence performance targets. The need for late opening of catering units to satisfy the demands of a nominal number of customers needs to be accounted for in the overall pricing process. The waste associated with extended service has to be accounted for, and before the level becomes unacceptable a review will take place to find solutions to the difficulty.

## **Vending**

Wherever possible vending prices are kept to the same level as counter prices, occasionally fully serviced vending machines are slightly premium priced to offset the service charges.

## **Feedback**

Formal customer comments or questions relating to pricing are usually dealt with on an individual basis through the complaint procedure, each case being investigated individually and a response given by the University Catering Manager. Unit managers deal with informal comment and localised problems.

## Queen Mary, University of London: Time to Talk

Over the years Queen Mary has tried to implement appraisal schemes without real success, and of those I had experienced, were aimed primarily at academic staff, there had never been a scheme that included all grades of staff in a Department.

As staff are our most important asset, we developed a scheme for the Conference, Catering and Residential Services Department in order that CCRS's aims, objectives and training needs could be discussed on a one to one basis with its staff and their important role in the organisation. It also opened up the opportunity for staff to ask questions, express their views on the organisation; operations and most importantly, offered suggestions as to how we could improve the working environment to achieve our goals.

The criteria used was that everyone in the Department should be included in the process and that the appraisal should be carried out once a year in the first instance, increasing in frequency if necessary in future years. This is revisited now every six months. The appraisal at first was not linked to any pay review, but now we are able to offer merit awards to set criteria.

The essential elements of the appraisal scheme were to:

- Set individual, or team targets for an agreed period
- Feed back to staff management views on their work performance
- Discuss issues of importance to the individual, team or Department
- Identify training and development needs where these contribute to the achievement of CCRS objectives
- Help staff plan their future working lives within CCRS
- Discuss staff satisfaction with working in the Department

Several other factors were also taken into account, and were:

- Appraisals are carried out in a formal way and recorded in writing on the forms
- Appraisers are responsible for ensuring that target dates are met and that any staff who are sick or absence are appraised within one week of their return to work
- 'Permanent' agency staff are included in the process
- Trade Unions and Personnel Department were in agreement with the scheme
- Paperwork was to be simple, attractive, and be professionally designed as appropriate to each group of staff

All staff in CCRS, including Managers and Heads of Department, will complete a 'Time to Talk' form (see below), or an equivalent document, in a formal way with their Manager. We believe that all staff play an important role in helping CCRS to achieve CCRS's goals to constantly improve facilities and services to its customers, whether they are students, staff or conference visitors. When completed, this document is seen by the Head of Section who will ensure that any action the Manager has agreed is carried out, and will also want to know that the individual has also carried out their agreed action.

I think it is true to say that it has taken two to three years for the system to be embedded and it is now that the benefits are really starting to show, these include:

- Better communications between staff and Managers
- Clear definitions and clear objectives
- Understanding of Departmental objectives

- Clearly identifies Training and Development needs
- Ensures issues are dealt with
- Improves motivation

Other benefits that have developed from the appraisal system is that Merit awards which have been introduced which allowed the Managers to recommend staff or groups of staff who have achieved set criteria to be financially rewarded if the Department achieves its overall set objectives.

This appraisal process started in 1998, the questions and format have been amended and improved each year. In 2001 the appraisal was revisited after six months to ensure that all goals and training needs were accounted for, and this process has now been included in the questionnaire and will continue. Also in this year we developed and introduced the Merit award system which will reward personal and group achievements.

## **Time To Talk**

Make sure you prepare yourself for your *Time to Talk* discussion by making some brief notes against the questions below; if you can't think of a response ask a colleague or your manager for some help. This document is yours to keep; you do not have to give it to anyone unless you wish to do so. Your manager will write up the discussion for you on a new form if necessary. You will need to bring your **job description** and **task list** with you; this gives you the opportunity to discuss these. When you have finished the discussion, your manager will ask you to sign the back sheet which means that you agree with the content of the discussion and the agreed action points. The content of the discussion will remain confidential between yourself and your manager although your Section Head will sign off the completed document. All identified training needs will be forwarded to the CCRS Training and Development Manager. This is your opportunity to make suggestions about how you carry out your job and ways in which we can improve. Don't waste this opportunity. Don't worry if things change slightly over the next few months; your manager will carry out a *Time to Talk* review in approximately six months time.

**Job Description**

**Task List**

**Personal details**

### **Your Time to Talk Sessions:**

1. Your last Time to Talk review took place in.....200.../... What issues were raised at that review and how have they been dealt with?
2. In what ways have you benefited from your Time to Talk session? What suggestions can you make for improving the process?

### **You and CCRS:**

3. Are you aware of the different Sections that CCRS manages? Can you name them?
4. What are CCRS's main objectives; what are we trying to achieve as a department?
5. Can you tell me what standards your Section is trying to reach?
6. What can you personally do to help your Section meet its standards for next year? Think about:
  - Your own performance
  - Your contribution to the team
  - Your contribution to your Section and CCRS.

### **You and Your Job:**

7. Do you think you are being used to your full potential? Do you feel valued? If not, what do you think your manager or CCRS could do to make you feel more valued?
8. What have you done particularly well over the past year?
9. In what ways have you experienced difficulties? What suggestions can you make to enable these difficulties to be overcome?
10. What additional materials and/or equipment do you think would help you achieve a better standard?

*Continued on the next page:*

## **Time To Talk**

### **You and Your Job:**

11. If you could change anything about your job, what would it be?
12. CCRS puts great emphasis on Health and Safety. What working practices, services or facilities do you think could be changed to help you in your job and provide a safer working environment?
13. Last year your Section lost.... Days through sickness, which cost CCRS approximately £..... What do you think could be done to minimise these figures?
14. CCRS encourages feedback from our customers; if you were a customer using the services you provide, what suggestions would you give to improve the service?
15. CCRS promotes, and continually reinforces, the importance of teamwork. How do you think you and your colleagues perform as a team? Can you make any suggestions for improving the overall team performance?

### **You and Your Manager:**

16. Your manager holds regular meetings with you and your team. What uses do you think these meetings serve? What suggestions can you make to improve communications between your manager, yourself and your team?
17. What other opportunities do you have, other than Time to Talk, to speak to your manager on a one-to-one basis?
18. What things do you think causes your manager to feel stressed? What do you think you and your manager could do to minimise that stress?

### **You and Your Training and Development:**

19. What training have you had over the past year and how has this made a difference to the way in which you do your job? What further training do you think would benefit you?
20. Mandatory training for your area is
  - Induction
  - Customer Care
  - Basic Health and Safety
  - Manual Handling
  - Food Hygiene (Food handlers only)

Why do you think this training is mandatory?

21. Would you like to make any additional comments or suggestions?

*Thank you for contributing to this session. If you would like to add any comments please see your Manager.*

# Time to Talk 2002

## What are we Agreeing to Do?

We hope that you have found "Time to Talk" useful and that it will make working for CCRS a better experience.

The outcome of this years "Time to Talk" is:

.....(staff name) agrees to do the following:

- 1.
- 2.
- 3.
- 4.

Signed. .... Date .....

.....(Manager) agrees to do the following:

- 1.
- 2.
- 3.
- 4.

Signed. .... Date .....

Training needs have been identified and agreed as.

- 1.
- 2.
- 3.

Section Head. .... Date .....

# Time to Talk Review 2002

## Time to Talk Review to be completed July/August 2001

What were the issues raised at the time to talk session at the beginning of the year?

.....  
.....

From the issues listed above what action has been taken?

.....  
.....

What training has been completed?

.....  
.....

List any action or training that is outstanding - give reasons why this is outstanding and state a date for completion.

.....  
.....

Are there any other issues that have arisen since the time to talk session that need to be dealt with?

.....  
.....

Are there any additional training needs?

.....  
.....

Employee .....

Date .....

Manager .....

Date .....

Section Head .....

Date .....



## Sheffield Hallam University (SHU): Catering Services Customer Value Management – Hospitality Services

### How the process was applied

Two groups, one for staff and the other for customers, were formed to undertake this customer value exercise.

The staff group was a cross section of eight catering staff from City Campus and the Stoddart Building. They were chosen because of their involvement in delivering Catering Hospitality Services. Both food services and food production staff attended.

Similarly, a group of eight hospitality customers were nominated by Catering Services Managers. These customers were regular users and represented central departments and schools. Representatives came from the Stoddart Building, Science Park, main Campus and the Sheaf Building.

Each group attended a two-hour workshop-style session, led by Mark Swales, assisted by Frances Dowd. The concept of customer value management was introduced and how it will contribute to the FD customer results criteria in the EFQM Excellence Model. The concepts of effectiveness, efficiency, accessibility, relationships and price were described to each group. The key attributes under each heading were identified through a process of brainstorming and discussion by the group, and consensus reached on how these should be described. An initial scoring process identified priority attributes, which were then weighted. A further form-based survey of each group measured perceived performance under each heading.

The results of both groups were plotted onto Excel spreadsheets with graphical analysis to facilitate comparisons of the results. A summary of the key findings is presented below. Points for action based on the outcomes of the exercise are also presented.

### Priority attributes

The table below shows the top five attributes identified by each group. The following summaries examine the results under each key concept.

Staff	Customers
Presentation	Quality
Promptness	Timing
Friendliness	Professional
Value for Money	Value for Money
Quality ingredients	Temperature/Freshness



#### Effectiveness – how good is it?

Customers identified **quality** as the most important attribute followed by **temperature of products/freshness**. Staff identified **presentation** as the most important attribute, followed by **quality ingredients**. It could be argued that both these are also as important to customers as characteristics of a 'quality' service.

**Presentation** only materialises in customer comments in terms of **labelling** and **ease of eating**. Customers' perception of effectiveness is linked to quality attributes of the service. These can be expressed as quality factors covering the variety, volume, variation and variability features of the service.

#### Efficiency – how is it delivered?

Both customers and staff perceptions matched here with **timing** (customers) and **promptness** (staff) being the predominant attributes. This confirms that catering staff are aware of how important this is to customers. Staff did express concern over not always having the resources to meet customer demand/expectations. The fluctuation in service demands over the course of the day and the year is clearly an issue that Catering Services needs to address.

Customers identified a requirement for the **layout** to be considered by Catering in advance of the service being delivered.

The importance of the service being able to **respond flexibly to late changes** was expressed.

Issues put forward by the staff group such as **customer dialogue** and **well-trained staff** did not appear in this section from the customer's viewpoint. This point should be emphasised as staff should be aware of these as priority issues, but they should be transparent to the customer. Effective training aligned to the needs of the business will have a positive impact on operations efficiency. Good two-way communication also facilitates understanding of customer expectations and precisely what the service can provide within the resources available.

#### Relationships – credibility of person delivering it

Customers spoke of **professionalism** here (the third most important attribute overall), ??but the only attribute weighted by customers in the section??is there a word missing?.

Staff described **friendliness** and **staff appearance**.

Separate priorities identified by customers in this area which influenced the high points awarded to **professionalism** were that staff should be friendly, have product knowledge, a consistent approach (especially across different venues) and an understanding of how their conduct and presentation impacts on the customer experience.

### Accessibility – how easily it can be got?

Neither customers nor staff weighted any attribute in this area (so there is also no performance rating).

Catering staff, unlike the customer group, considered **disabled access** and the **availability of space**.

In terms of customer access to the service, both groups did agree that the accuracy of booking information is critical. Customers expressed concern that the Help Desk/Catering did not provide **confirmation** to customers of the booking details.

It is in this area that customers placed many of their issues relating to the transparency of the 'total experience', such as **integrated services, event co-ordination, services to all buildings**.

### Price – cost of service (economic delivery)

**Value for money** was the only weighted attribute in this section by customers. Not surprisingly the staff group also weighted this highly. This group identified **competitiveness** as being important but this was not weighted nor singled out for consideration by the customer group.

Little discussion took place with the customer group on competitors' ability to satisfy more or less than SHU Catering Services. It did become clear that there is some internal invisible competition, where customers choose to provide hospitality via regular cash sales outlets within SHU rather than use the internal re-charging system.

Comments were made about **prices being too high** and not **consistent across the sites**. Customers felt that the **billing process** was not customer focussed, and policies on **minimum numbers** and **refunding** were not clearly understood.

## **Summary**

Customer perceptions are in part based upon a lack of information of how SHU's Hospitality Catering Services are operated. Details of the price, product and terms and conditions of booking are not understood by customers. The satisfaction scores recorded by the two groups are very close with an overall customer and staff rating of 3.89 and 4.04 respectively. These scores will now be used as a benchmark of where the service currently is and how, when the exercise is repeated, it has improved. Overall the scores show a reasonable level of satisfaction of the service with customers. Having said this, Catering Services must also recognise that a 'change of gear' will be required to fully meet customer expectations of a professional service that provides a quality, value for money experience.

To move forward, specific key performance indicators should be established to monitor service improvements. Managers must also ensure that adequate resources are allocated to

those areas identified for improvement through the business planning and budget setting process. Tackling the areas for improvement on how Hospitality Catering Services are marketed and administered will, on the basis of this exercise, assist in the improvement of customers' perceptions on Hospitality Catering services.

### **Points for action**

Catering Services needs to:

- recognise that the 'total experience' is paramount for internal clients and ensure operational and training plans reflect this
- ensure staffing and equipment resources are focused on delivering a timely service and that a key performance indicator should be created to measure this
- understand the implications of customers seeking a 'professional' service as opposed to being 'friendly', and that inconsistencies in service delivery and staff attitudes are noticed by customers.

A review of how rooms booked for a catering event are pre checked to ensure that there are tables to lay food and beverages on and that the room is clean and tidy should be considered. In addition, a review of administration processes should be undertaken in Catering Services to address the issues raised by customers concerning the following:

- billing processes, receipt of internal recharges
- how information is relayed between customer/help-desk/and catering
- the feasibility of customers receiving written confirmation of booking details
- developing specific key performance indicators for SHU's hospitality catering service.

Value for money is the key attribute associated with price by customers. Perception of VfM will be influenced by the 'total customer experience'. Ensuring regular customer feedback, consultation with customers on menu structures needs to be deployed consistently throughout the service. Only 1 customer out of 8 recognised the document entitled Hospitality Catering Services 1999/2000. Ignorance of the details in this document is a clear barrier to providing the service. Customers are clearly not aware of Catering hospitality pricing policies, procedures or product ranges available.

Continuing the customer value process:

- customer groups for cash sales to staff should include representatives of hospitality purchasers

## **UMIST: Trading Services Mission Statement**

'Trading Services is responsible for providing customer services, facilities and support to UMIST staff, students and visitors, with the aim of supporting the University in its pursuit of academic excellence.

Trading Services wishes to build on high standards of service and quality already provided for its customers and recognised through the award of Investors in People.

As an organisation we remain committed to providing better customer service by the involvement and development of staff.'

### **Primary aims:**

- The primary aim of the Department is to ensure that its income equals its expenditure.

### **Secondary aims:**

- The Department will aim to operate within a financial framework which allows it to continuously develop its business. This aim will be achieved by providing services which continually meet the changing expectations of its customers.
- Customer satisfaction coupled with successful financial performance, will allow the Department to improve the infrastructure in which its various businesses operate. Furthermore these conditions support the aim of creating personal development opportunities for those staff who wish to progress in their careers.

### **Central Catering Business Aims – Financial year 2002/03**

The following statements explain what the financial targets are for Central Catering:

#### Income:

To maintain students / staff income to achieve £714,000

To achieve conference and vacation income of £830,000

Total targeted income for the year is therefore £1,545,200.

#### Expenditure:

*Management and food production staff will be expected to control costs as indicated:*

- Food cost of sales @ 37% of income.

*Management and service staff will be expected to control labour costs as indicated:*

- Labour cost @ 44% of income.

*Management will be expected to control overhead costs:*

- Overheads @ 26.8% of income.

The total targeted operating deficit for the year is £67K. This is allowing £152K for refurbishment.

#### Business aims and objectives

All staff are expected to contribute to achieving the Business Aims and Objectives listed below. Working together, Management and Staff can achieve the Objectives in the new financial year.

*Maintain high levels of customer care to both students, staff and conferences customers*

This will be monitored by the issuing of questionnaires in terms 1 and 2. Success will be measured by achieving a score of 70% or better for good / excellent responses in the following areas:

- friendliness of staff
- cleanliness of catering areas
- quality of food
- variety and choice
- quality of service

This requires time tabling for maximum benefit.

Customer groups will continue to enable real needs to be identified and services modified to suit. A product development group will be set up. An environmental group will be set up to deal with Central Catering issues

Measure of success

- action on the results of the questionnaires and a comparison of terms 1 and 2
- practical results from the environmental group
- practical results from the product development group

*To complete development of strategic planning*

The infrastructure will continue to be developed during the financial year. Plans laid to redevelop the main building will come to fruition

Plans will need to be developed in conjunction with the Student Association to provide a quality outlet in the foyer of the Student Association

The Geller tills need to be continually updated and meaningful management reports actioned.

Measure of success

- the successful opening of the main building project
- completion of the Student Association project

*The continued effective use and personalisation of operating manual*

Measure of success

- the achievement of implementing personalised development files.

*To continue to place business where profits can be maximised*

This will require continued management of bookings to make sure that only cost effective business is placed in the appropriate business areas.

*To ensure that best practice is complied with*

Measure of success

- completion of regular daily audits by supervisory staff
- achievement of a health and safety culture, where health and safety issues are reported regularly by the catering staff
- the continued maintenance of the safety book in catering outlets
- quarterly audits of health and safety issues by management
- a regular monthly audit of cleaning
- the continued quarterly central catering health and safety meetings to review catering as a whole

*To continue examining: and improving cost control*

This will include continuation of regular meetings to discuss cost percentages achieved during the previous operating period and the continued development of supervisory staff

Measure of success

- weekly meetings with supervisors to discuss effective cost control
- production of individual weekly operating statements for outlet salaries and wages
- production of individual monthly operating statements for outlets for all costs
- production of management reports from Geller tills
- achievement of good cost control

*To ensure staff participate fully in achieving the business aims*

- continued regular meetings between catering management and supervisors, which will address operational issues for the forthcoming week, and be an opportunity to raise any items that are a concern

- to continue all training and development reviews and pay particular attention to completing the training needs for all staff
- to continue to empower supervisors and increase the ownership of the business
- to continue to make sure that effective two-way communications operate between supervisors and staff by the continuation of daily meetings to discuss operational issues
- to continue to make all the staff aware of the in-house training and development opportunities and the way in which they may make a personal contribution to the achievement of business aims and objectives
- to continue to work towards enabling all individuals to achieve their personal development objectives, including NVQ development
- to continue to make sure all staff contribute to best practice with regards to health and hygiene and safety in all operational areas, by reporting any deficiencies to supervisors or unit safety reps
- to continue to make sure all employees understand their responsibilities and the health and safety procedures that apply to their particular working areas, as outlined in the personal development files
- to continue to update the personal development file with new information on training with (visual displays in the file)

#### Measures of Success

- continue updating personalised personal development files
- continue delivery of category A training.
- continued effective communication and a year on year improvement in staff perception.

#### *Development of Product*

It is essential that catering continues to upgrade both the product and the service offered to the customers to ensure that offering stays fresh and appealing.

#### Measures of Success

- the continued review of and introduction of new products for the Mumford room, the senior common room and the Renold Café Bar
- to develop the breakfast service and target the halls of residence
- to make the new outlets profitable
- to develop a marketing campaign for Freshers week and Xmas (and to deliver it). Success will be measured by growth in student income and Xmas business
- to remain in touch with market trends with visits to other Universities and competitors and to develop a database of competitors' prices

## Annex D

### Glossary

<b>CUBO</b>	Conference of University Business Officers
<b>EFQM</b>	European Foundation for Quality Management
<b>EMS</b>	Estates management statistics
<b>EPOS</b>	Electronic point of sale
<b>EWG</b>	Expert Working Group
<b>FTE</b>	Full-time equivalent
<b>HE</b>	Higher education
<b>HEFCE</b>	Higher Education Funding Council for England
<b>HEI</b>	Higher education institution
<b>HOCG</b>	Heads of Consortia Group
<b>HR</b>	Human resources
<b>IIP</b>	Investors In People
<b>ISO</b>	International Organisation for Standardisation
<b>IT</b>	Information technology
<b>KPI</b>	Key performance indicators
<b>KPR</b>	Key performance results
<b>NEUPG</b>	North East University Purchasing Group
<b>NPG</b>	National Purchasing Group
<b>OJEC</b>	Official Journal of the European Communities
<b>QA</b>	Quality assurance
<b>PR</b>	Public relations
<b>SWOT</b>	Strengths, weaknesses, opportunities, threats
<b>TUCO</b>	The University Caterers Organisation
<b>VFM</b>	Value For Money