

# Hospitality Management

❧ A practical introduction ❧



EDITOR

Deseré Kock

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*sb* **SUNBONANI  
SCHOLAR**

*Hospitality Management – A practical introduction*

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# » Introduction and outline «

## Scope of the book

The tourism and hospitality industry plays an increasingly important role in creating and ensuring sustainable employment. Major sectors in the South African economy like mining and agriculture face insurmountable challenges especially pertaining to labour unrest and continuous wage strikes. Despite this turmoil, the tourism and hospitality industry has grown and continues to create much needed job opportunities. The aim of this book is to provide a practical perspective on the management and operational issues hospitality establishments face on a daily basis. The practical nature of the book is valuable for all hospitality establishments, including guest houses, lodges, B&B's, restaurants, bars and hotels. The contributors to the book have an impressive combination of industry experience and theoretical knowledge to convey a practical approach to hospitality management.

## Structure of the book

### Theme 1: Human resource management

*Deseré Kokt*

Due to the complex and challenging nature of the hospitality industry many challenges exist that revolve around human resource issues. Employees represent the core of any hospitality establishment and it is imperative that their issues and concerns are addressed by management.

### Theme 2: Front and back office management

*Christine Boshoff*

This theme provides an overall perspective on what front and back office management implies and articulates the roles and duties of the various positions within a hospitality establishment.

**Theme 3: Financial controls and budgets**

*Lisa-Marie Couglan*

Financial controls and the process of budgeting is a crucial activity in any organisation. This theme aims to provide a concise guide on the financial planning and budgeting aspects that should be considered by hospitality establishments.

**Theme 4: Food service control systems**

*Jacques Ras*

This theme deals with various food service systems, as well as the administrative controls that need to be considered by hospitality establishments.

**Theme 5: Beverage management**

*Fezeka Judith Mavuso*

Beverage management is the heart of the hospitality industry and this theme focus on the operational issues associated with beverage management.

**Theme 6: Health, safety and hygiene**

*Yvonne Maluleke-Makubalo*

The importance of health, safety and hygiene in hospitality establishments are expressed in this theme, as well as the applicable legislation that governs these issues.

**Theme 7: Culture, religion and food rituals**

*Zorada Hattingh*

Different cultural and religious groups have different orientations towards food and food preparation. This theme relates the various cultural and religious rituals of patrons that might visit your hospitality establishment.

**Theme 8: Protocol and etiquette**

*Jeanine Nothnagel*

Protocol and etiquette is an important consideration in dealing with guests on a daily basis. Hospitality staff needs to be properly informed about protocol and etiquette.

**Theme 9: Design and décor considerations**

*Marianne le Roux*

The design and décor of any hospitality establishment is crucial in attracting patrons. This theme relates the design and décor aspects that should be considered, especially if establishments want to become graded by the Tourism Grading Council of South Africa.

**Theme 10: Tourism and local attractions**

*Johan Hattingh*

As the tourism and hospitality industries are inextricably linked, it is imperative that especially accommodation establishments are well informed about local cuisine and attractions. This theme refers to strategies to enhance local tourism.



# Human resources management

*Deseré Kokt*

## 1. Introduction

The hospitality industry is about people – customers on the one hand and employees on the other. As employees are responsible for service delivery and interacting with paying customers it is imperative that human resources issues in hospitality establishments receive special attention. The aim of this theme is to explain the basics of human resources management and to also refer to Sectoral Determination 14 of the Basic Conditions of Employment Act (75 of 1997) that governs the basic employment conditions of workers in the hospitality industry.

## 2. Human resources management in the hospitality industry

Any hospitality establishment is as good as its staff, and building long term relationships with customers is an essential activity. This implies that employees represent the competitive advantage of hospitality establishments. The challenges the hospitality industry face in the South African context is very similar to that in the international domain, and the industry has even been identified as a “high risk and problem sector” by the Department of Labour (BUSAs, 2010:3). This is mainly due to the numerous inherent challenges like long hours, working at night, weekends or holidays in a strenuous and often hectic work environment and work-life conflict, as well as the skills required from hospitality employees. The skills required from hospitality employees are varied and involve both technical (like laying tables and preparing food) and professional (like friendliness and patience) skills that transfer into the relationship dimension where a collegial relationship is established between staff and customers.

As the service sector continues to grow, and more expectations are placed on the delivery of services, a more pronounced emphasis is placed on managing human resources. Human resources management has become exceedingly

specialised and it is imperative that managers at all levels adhere to sound human resources practices.

Human resources management deals with all the people-related matters in an establishment. As the hospitality industry is about people, all hospitality managers will have responsibilities that involve dealing with human resources.

Any form of human resources planning should be done at a strategic level and these decisions will influence the following human resources functions and actions:

- After the strategic human resources needs of an establishment have been established, it is important to analyse what the organisation needs in terms of knowledge, skills and competencies for the various positions it has to offer. This is done through **job analysis**.
- Based on job analysis, **recruitment** implies the search for suitable candidates for particular positions. Recruitment can be internal (like referrals and internal advertisements) or external (like recruitment agencies and newspaper advertisements).
- **Selection** implies selecting the most suitable candidate for a particular position based on the knowledge, skills and competencies of the candidate. Selection is usually done through the selection interview.
- **Hiring** is the process of making a candidate an offer of employment and officially employing the person.
- **Induction**, also known as socialisation, is the process of ensuring that an employee becomes acquainted with the organisation, as well as what is expected in terms of performance and behaviour.
- Through **placement** candidates are put in specific positions (this can be in the form of hiring a new employee or redeploying an existing employee). The correct placement of staff is essential to ensure that employees perform the jobs they are suited for and qualified to perform.
- **Employee training** usually involves job related learning that is provided by an employer with the aim of improving employee's skills, knowledge and attitudes so they can perform their duties according to set standards.
- **Employee education** concerns the preparation of an employee for a job different to what the person is currently holding. Education is a continuous process of growth and development.

## Human resources management

- **Human resources development** is a learning experience mostly organised by an employer, usually for a specific period in order to improve the performance of an employee or enhance personal growth.
- **Coaching** is when someone is under the tutelage of an experienced person that can provide immediate feedback on what is expected from an employee.
- As organisations need to accomplish certain objectives, it is crucial that employees are able to work as a team. **Team building** activities are essential in eliciting unified efforts from employees.
- It is essential that the performance of employees should be evaluated on a regular basis. **Performance evaluation** should be fairly and consistently applied to ensure that the performance of employees is adequately measured.
- If employee performance is not up to standard there should be certain remedial actions that can assist employees in improving their performance. **Counselling** can be used to assist employees in enhancing their performance. Counselling can also assist employees in coping with personal problems.
- In order to attract and retain suitable and aptly qualified human resources, an organisation needs to fairly and adequately reward its employees through a system of **compensation management**.
- **Incentive compensation** constitutes an additional reward for outstanding efforts on the part of the employee. Incentives are usually financially based.
- **Benefits** offered to employees are usually linked to employment and could be regarded as an indirect form of compensation. Benefits can include aspects such as retirement plans or accident and life insurance.
- **Information technology** for managing salary administration is an important tool in managing the administrative issues related to the payroll. Programmes such as Sage's VIP Payroll are widely used.
- **Discipline** is an integral part of the functioning of an organisation and is crucial in the smooth running of an organisation.
- Through **employee wellness programmes** management show that they care for the wellbeing of their employees. Employees who are able to cope with work-related and personal challenges are likely to perform better at their jobs.

- **Labour relations** is concerned with the relations between employer(s) (and/or manager(s) as the representative of the employer) and employees (and/or their representatives such as a trade union).
- The manner in which employees are treated has bearing on their levels of **motivation**. The various theories that attempt to explain this concept provide insight into how individuals perform on an individual level and what motivates them to excel at their jobs.
- **Talent management** is a holistic approach to human resources planning aimed at enhancing organisational capability through a range of human resources interventions like, for example, training.

Human resources practices and principles must be an integral part of a strategic plan that line managers can use in their day-to-day interactions with employees. Due to the inherent challenges of working in the hospitality industry it is imperative that suitably qualified staff is retained and developed. Staff turnover (the rate at which employees leave the organisation) and talent management are constant issues that needs to be managed. Training has been found to be a good buffer against employees leaving an organisation and training is positively related to job satisfaction and retention. This supports the importance of sound human resources practices in hospitality establishments.

This does not always happen, as found by an inspection of 2 622 hospitality establishments by the Department of Labour. A number of establishments were noncompliant with regard to the following (BUSA, 2010:3):

- Minimum wages: Employers were unaware of annual increases, resulting in the underpayment of employees.
- Tips and commission: Employers neglected to pay employees the minimum wage in the event of their commissions amounting to less than the minimum wage.
- Wage calculation: Employers tended to calculate wages on a monthly basis, not taking into consideration overtime worked and their relevant payments.
- Information concerning pay: Payslips did not contain details regarding public holidays and overtime worked.
- Deductions: Employers illegally deducted a percentage of employees' earnings as security for uniforms issued.
- Written particulars of employment: Employers neglected to provide employees with copies of their employment contracts, resulting in the employees being confused about the terms of the contract.

- Rest periods: Employees were required to work double shifts with only a four-hour break in between shifts, in contravention of the Basic Conditions of Employment Act, which requires a 12-hour break in between shifts.
- Sunday work: Employers were paying normal wages for Sundays worked, instead of the legally required x1.5 rate.
- Night work: Employers did not compensate employees appropriately for hours worked at night.
- UIF: Most cases involved the employers being unable to provide proof of payment to the Unemployment Insurance Fund (UIF) and employees not being registered for UIF.

These could be regarded as serious transgressions which could impact on the morale of employees. It is therefore necessary for hospitality establishments to comply with legislation.

### **3. Basic Conditions of Employment Act (75 of 1997): Sectoral Determination 14: Hospitality Sector, South Africa**

The Basic Conditions of Employment Act (75 of 1997): Sectoral Determination 14: Hospitality Sector applies to all employees and employers in the hospitality sector in South Africa. The hospitality sector is described as any establishment that provides accommodation in a hotel, motel, inn, resort, game lodge, hostel, guest house, guest farm or bed and breakfast establishment. This applies to short stay accommodation, self-catering, timeshares, camping and caravan parks, restaurants, pubs, taverns, cafes, tearooms, coffee shops, fast food outlets, snack bars and all forms of catering.

The aim of this section is to provide an overview of the most important aspects of the sectorial determination.

#### *Minimum wages*

According to the amended Sectoral Determination 14 the following minimum wages apply:

**TABLE 1** Minimum wage for employers with less than 10 employees

1 July 2013 to 30 June 2014			1 July 2014 to 30 June 2015			1 July 2015 to 30 June 2016		
Monthly	Weekly	Hourly	Monthly	Weekly	Hourly	Monthly	Weekly	Hourly
R2415.86	R557.55	12.39	Previous minimum wage + CPI* + 1.5%			Previous minimum wage + CPI* + 1.5%		
			* The CPI to be utilised is the CPI (excluding owner's equivalent rent) as made available by Statistics South Africa six weeks prior to 10 June 2015.			** The CPI to be utilised is the CPI (excluding owner's equivalent rent) as made available by Statistics South Africa six weeks prior to 10 June 2015.		

**TABLE 2** Minimum wage for employers with more than 10 employees

1 July 2013 to 30 June 2014			1 July 2014 to 30 June 2015			1 July 2015 to 30 June 2016		
Monthly	Weekly	Hourly	Monthly	Weekly	Hourly	Monthly	Weekly	Hourly
R2692.74	R621.45	R13.81	Previous minimum wage + CPI* + 1.5%			Previous minimum wage + CPI* + 1.5%		
			* The CPI to be utilised is the CPI (excluding owner's equivalent rent) as made available by Statistics South Africa six weeks prior to 10 June 2015.			** The CPI to be utilised is the CPI (excluding owner's equivalent rent) as made available by Statistics South Africa six weeks prior to 10 June 2015.		

It is also stipulated by the amended determination that should an employer provide an employee with a uniform the employer shall not require payment for the uniform in any way.

**Hours of work**

- An employer may not require an employee to work more than:
  - 45 hours per week;
  - Nine hours per day if the employee works for five days or less, or eight hours if the employee works more than five days per week.

**Overtime**

- An employer may not require or permit an employee to:
- work overtime except in accordance with the agreement between the employer and employee;
  - to work more than 10 hours overtime;
  - to work more than 12 hours, including overtime, per day.

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### *Payment of overtime*

- An employer must pay an employee at least 1.5 times the employee's wage for overtime worked;
- Despite clause 1 an agreement may provide for an employer to:
  - pay an employee not less than the employees ordinary wage for overtime worked and grant the employee at least 30 minutes' time off on full pay for every hour of overtime worked;
  - grant an employee at least 90 minutes paid time off for every hour of overtime worked.
- An employer must grant an employee paid time off in terms of subclause 2 within one month of the employee becoming entitled to it.
- An agreement in writing may increase the period contemplated by subclause 3 to twelve months.

### *Compressed working week*

- An agreement in writing may require or permit an employee to work up to twelve hours per day, inclusive of meal intervals.
- An agreement in terms of subclause 1 may not permit an employee to work:
  - more than 45 ordinary hours per week;
  - more than 10 hours overtime;
  - more than five days per week.

### *Work on Sundays*

- An employer must pay an employee that works on Sunday at double the employees wage for each hour worked, unless the employee normally works on a Sunday, in which case 1.5 times the employee's wage applies.
- If the payment calculated in terms of subclause 1 is less than the employee's daily wage the employee must receive the daily wage.
- Despite subclauses 1 and 2 an agreement may permit an employer to grant an employee who works on a Sunday paid time off equivalent to the difference in value between the pay received by the employee for working on a Sunday and the pay the employee is entitled to in terms of subclauses 1 and 2.

### *Night work*

- Night work means work performed after 18:00 and before 06:00 the next day.

- An employer may require or permit an employee to perform night work if so agreed if:
  - an employee is compensated by the payment of an allowance, which may be a shift allowance or by reducing working hours;
  - transport is available between the employee's residence and the workplace;
  - the transport cost is more than the daily cost to the employee the employer who requires an employee to perform night work must subsidise such an employee for transport expenses.
- An employer who requires an employee to perform work on a regular basis after 23:00 and before 06:00 the next day must:
  - inform the employee in writing or verbally of any health hazards associated with the work that needs to be performed;
  - at the request of the employee undergo a medical examination.
  - transfer the employee to suitable day work within a reasonable time.

#### *Meal intervals*

- An employer must give an employee that works continuously for more than five hours a meal interval of at least one continuous hour.
- During a meal interval an employee may be required or permitted to perform only duties that cannot be left unattended and cannot be performed by another employee.
- An employee must be paid:
  - for a meal interval in which the employee is required to be available for work;
  - for any portion of a meal interval that is in excess of 75 minutes, unless the employee lives on the premises at which the workplace is situated;
  - for the purpose of subclause 1 work is continuous unless it is interrupted by a meal interval of at least 60 minutes.
- Any agreement in writing may:
  - reduce the meal interval to not less than 30 minute;
  - dispense with a meal interval for an employee that works fewer than six hours a day.

### *Daily and weekly rest periods*

- An employer must grant an employee:
  - a daily rest period of at least twelve consecutive hours between ending work and starting work the next day;
  - a weekly rest period for at least thirty-six consecutive hours which, unless otherwise agreed, must include a Sunday.
- A daily rest period in terms of subclause 1(a) may, by written agreement, be reduced to 10 hours for an employee:
  - that lives where the workplace is situated; and
  - whose meal interval lasts for at least three hours.
- Despite subclause 1(b) an agreement in writing may provide for a rest period of at least sixty consecutive hours every second week.

### *Public holidays*

- An employer may not require an employee to work on a public holiday, except by mutual agreement.
- If a public holiday falls on a day the employee normally works an employer must pay:
  - an employee that does work on a public holiday at least what the employee would have earned for a day's work;
  - an employee that does work on a public holiday at least double the employee's wages.
- If a shift worked by an employee falls on a public holiday and another day, the entire shift is deemed to have been worked on the public holiday, but if the greater part of the shift was worked on the other day the whole shift is deemed to be worked on the other day.
- A public holiday may be exchanged for any other day.

### *Annual leave*

- An employer must grant an employee:
  - at least three weeks' (21 consecutive days) leave with full pay for every twelve months of employment;
  - by agreement, at least one day of annual leave for every 17 days worked;
  - by agreement, one hour of annual leave for every 17 hours worked.

- An employer must grant an employee an additional day of paid leave if a public holiday falls on a day during the employee's annual leave on which the employee would otherwise have worked.
- An employer must grant:
  - annual leave not later than six months after the end of the annual leave cycle;
  - the leave earned in one year over a continuous period if requested by the employee.
- An employer may not pay an employee instead of granting paid leave, except on termination of employment.

#### *Sick leave*

- The 'sick leave cycle' means the period of 36 months employment with the same employer.
- During sick leave the employee is entitled to an amount of paid sick leave equal to the amount of days and employee would normally work during a period of six week.
- A medical certificate must be provided if an employee is absent from work for more than two consecutive days or more than two occasions during an eight week period.

#### *Family responsibility leave*

- This applies to an employee:
- who has been employed by an employer for longer than four months; and
  - who works at least four days per week for that employer
- Three days' paid leave must be granted during each 12 months of employment for the following events:
  - when the employee's child is born;
  - when the employee's child is sick;
  - in the event of death of an employee's spouse or life partner, parent, adoptive parent, grandparent, child, adoptive child, grandchildren or sibling.

#### *Maternity leave*

- An employee is entitled to a least four months consecutive maternity leave.
- An employee may commence maternity leave:

## Human resources management

- any time four weeks before the expected date of birth, unless otherwise agreed;
- on a date specified by a medical practitioner or midwife.
- An employee may not work for six weeks after the birth of her child.
- If an employee miscarries during the third trimester or bears a stillborn child she is entitled to six weeks maternity leave.

### *The Culture, Arts, Tourism, Hospitality and Sport Sector Education and Training Authority (CATHSSETA)*

CATHSSETA, previously known as THETA, is responsible for ensuring that standards are put in place that relate to the development and training of employees in the tourism and hospitality sector. CATHSSETA provides leadership in the industry by identifying current and future skills needs, developing strategic plans to assist the industry to meet those needs, and promoting training that will meet the needs of employees and employers alike (NDT, 2011:71). The Federated Hospitality Association of South Africa (FEDHASA), on the other hand, is recognised by government and the private sector as the official representative of the South African hospitality industry. FEDHASA aims to ensure a profitable and sustainable business environment for the South African hospitality industry. FEDHASA's core responsibility is to cover business, social, economic and environmental activities in support of the growth and sustainability of the South African hospitality industry (FEDHASA, 2011).

## 4. Summary

This theme related the importance of sound human resources management for hospitality establishments and provided a basic layout of Sectoral Determination 14 of the Basic Conditions of Employment Act (75 of 1997).

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# Front and back office management

*Christine Boshoff*

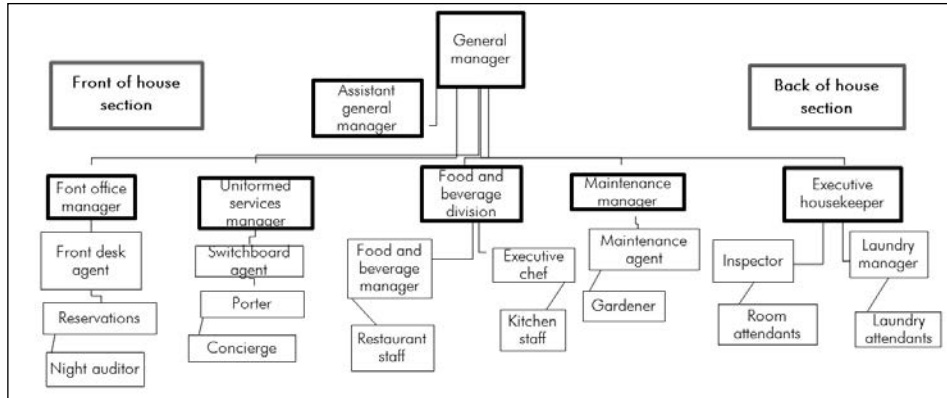
## 1. Introduction

The application of sound management principles is an integral part of successful hospitality operations. It is imperative that all employees comprehend not only their own roles and functions but also those of other departments. Hospitality staff needs to comprehend the bigger picture of how the entire establishment operates – this includes operations in the front of house and back of house sections.

The front of house section includes the part of the establishment that the guest can see, namely the front office, food and beverage section, waiters, porters and concierges. The back of house section is the section not visible to guests and includes housekeeping, maintenance and the kitchen. It is therefore crucial that management communicates effectively with employees to ensure the smooth running of the establishment.

This minimises misunderstandings and enables staff to be informed on what is required from them. The aim of this theme is to explain the duties and responsibilities of both front of house and the back of house staff.

Figure 1 indicates the organisational chart of a medium-sized establishment. The general manager is in charge of managing the establishment and the assistant general manager assists the general manager with this function. The assistant general manager liaises with the front office manager, uniformed service manager, food and beverage division manager, maintenance manager and the executive housekeeper regarding the management of the establishment and the information each of these managers might need in doing their jobs.



**FIGURE 1** Organisational chart of a medium-sized establishment

The general manager is responsible for the establishment and its employees. The front of house manager is responsible for the front desk agents, reservations agents and the night auditor. The uniformed services manager is responsible for the switchboard agent, porters and concierges. The food and beverages division is divided into the restaurant and the kitchen. The food and beverages manager is responsible for all the restaurant staff which includes the room service employees, if there are room service agents.

The executive chef is responsible for the kitchen staff, including the dishwashers. The maintenance manager is responsible for the maintenance agents and the gardeners. The executive housekeeper is responsible for housekeeping and has the inspector that is the supervisor of the room attendants or cleaners. The laundry manager is the supervisor of the laundry attendants. Detailed descriptions of these roles and functions are provided below.

## 2. Front of house section

The front of house section includes the front office manager (and those reporting to him/her), the uniformed services, the food and beverage section and restaurant staff.

### 2.1 Front office manager

Front office managers fulfil an important function as they directly interact with guests. Front office managers must resolve guest problems quickly, efficiently and courteously. The front office manager is the manager that has to ensure that the flow of communication between different divisions is uninterrupted and that each division does what is expected of it. In smaller establishments the

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front office manager can fulfil the duties of the front office agent, reservation agent and night auditor.

The front office manager should be well-informed of each booking and what guests have requested. They should also be knowledgeable about what happened during previous shifts. The front office manager must ensure that housekeeping receives the correct information regarding each guest's stay, their room status, and requests and requirements. The communication process between front office and housekeeping is of utmost importance, as this ensures the guest is checked in to a clean and well-serviced room. The front office should communicate discrepancies regarding room status to housekeeping and vice versa.

The front office should handle queries like guests requiring more towels, coffee, tea and so forth, after which they should contact housekeeping for the items to be delivered to the guest's room. In small establishments the front office manager is responsible for the keys and should also ensure that the master key set of the rooms is signed in and out by the executive housekeeper. In most establishments the executive housekeeper will keep the master key set in their office safe.

The front office manager is also responsible for the training, cross-training and retraining of front office personnel, as well as scheduling the front office employees, supervising work load and evaluating job performance. Training includes emergency training and evacuation procedures to ensure employees are knowledgeable about what to do in case of a fire. The front office manager should check all payments at the end of the shift and ensure it balances with the payments made and received. Shift meetings should be conducted with front office agents to ensure that employees are aware of any problems and that they are informed about relevant shift information.

The front office manager should also ensure that employees are uniformed and professional at all times. The front office manager should uphold the establishment's standards and make sure employees does the same. In short the front office manager oversees all activities to ensure satisfied guests. The front office manager must be tactful, punctual and be willing to listen to the issues of both guests and employees. The front desk agent, reservations agent and night auditor reports to the front office manager.

### *2.1.1 Front desk agents*

Front desk agents are responsible for checking guests in and out, as well as processing their payment. Front desk agents need to be responsive to the needs

of guests and they need to communicate these needs to other departments like housekeeping or maintenance. Large establishments usually have security guards that oversee the vehicle entrance gate and they should inform the front desk agent when guests arrive.

The front desk liaises with security on which guests should be staying at the establishment and how many rooms are available for walk-in guests (guests with no booking); a guest list is normally given to security each day. In small five star establishments the front desk agent would normally answer the gate bell. In most four/five star establishments the front desk agents would go out to the guest and meet the guest at the car. The front desk agent should be friendly and courteous at all times. This is where the front office and the uniformed services interact as the front desk and a porter is then called further assist the guest at their vehicle.

The front desk agent would accompany the guest into the building and ask them to complete the registration form, which should include the following:

- guest name and surname;
- guest's physical address and postal address;
- guest's contact numbers;
- if the guest is a business traveller the company details for the invoice;
- vehicle registration number;
- guest's ID number;
- and, most importantly, the guest's signature (after the guest has received an explanation of the policies and procedures regarding the booking).

When the guest is checked in the front desk agent would ask the porter to escort the guest to their room. Walk-in guests would be handled in the same manner except that the guest will be assisted at the front desk. In small establishments the front desk agent would walk with the guest to their room. The front desk agent liaises with maintenance if something is out of order, and with housekeeping if guests require additional amenities like an iron, more blankets and so forth. Upon checkout the front desk agent also has to ensure that the guest's stay was satisfactory. It is also imperative that any outstanding accounts should be settled before departure. In larger establishments it is usually mandatory that credit card details are on file or that a 50% deposit was paid when checking in. If credit card details have been received the guest is asked upon checkout to verify the invoice. Once the invoice is indicated as correct the payment is finalised.

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If a travel agent or company card was used the travel agent or company should complete an authorisation form prior to the guest's arrival to confirm they are paying the guests booking. The form must include the following information:

- card holder name;
- card type;
- card number (15/16 digit number);
- expiry date;
- CW (card verification value) number, which is the last three numbers on the back of the card;
- guest name and surname (person staying at the establishment);
- the amount to be paid;
- an authorisation signature and
- a copy of the card's front and back.

The front desk agent is also responsible to cash up at the end of the shift and balance payments. If a company pays the guest's folio, if not by card, then a pre-payment is normally required on departure. The guest must usually settle the outstanding charges if no other arrangement was made by the company. In small establishments a 50% deposit is usually required and the outstanding invoice is sent to the company for payment. All check-in information and payments are private and confidential and may never be given to any person outside the establishment, or to unauthorised personnel.

### **2.1.2 Reservations agent**

The reservation process starts as soon as the phone rings or an email or internet enquiry is received. The reservations agent should always be professional and pliable with each request. Once the reservation dates, length of stay and the number of guests are confirmed, the reservations agent should inform the guest about the availability of accommodation (including the size of rooms, amenities, etc.). Once confirmed the guest will let the reservations agent know whether the booking can be made.

When a guest books a room the following information is needed:

- guest name and surname;
- guest contact details;
- the method of payment;
- in the case of a company booking, company details are required;
- whether breakfast is required.

Once these details have been entered into the booking system a guest profile is created and the reservations agent sends a booking confirmation to the guest. Usually a deposit of 50% is required to confirm the booking. If no deposit has been made the booking will normally expire within two days, or as indicated in the booking confirmation. The reservations agent is responsible for entering payments received if there is no accounting department at the establishment.

A deposit is a means to guarantee the booking for the guest and the establishment. Once this is done the booking is confirmed and the reservation completed. Reservations agents can also be asked to book additional services like dinner, cinema or theatre tickets if there is no concierges' desk.

### 2.1.3 Night auditor

The night auditor's shift is called the 'graveyard shift' and is normally from 23:00 to 06:00 or 07:00. The night auditor checks the accounting records to ensure that payments received corresponds with what is shown in the system. One of the most important tasks of the night auditor is posting the day's room rate and room tax to each guest folio (account) at the close of business. The night auditor must ensure the accuracy of the charges to the guest accounts, ensuring that the sum of accounts received from the various departments (e.g. food and beverages) found on the control sheets (the establishment's charge sheet), equals the sum of the charges made to the guest accounts.

The night auditor is also responsible for printing the guest invoice and ensuring the guest receives it. The procedure followed will vary from one establishment to the next. Most establishments use computerised property management systems (PMS) to help perform the night audit. This also ensures that the correct items are billed to the correct guest ledger. Another duty of night auditors is to run daily management reports off the PMS. These include occupancy reports, calculations of average daily rate and revenue per available room. This ensures the establishment reaches its targets. The night auditor in smaller establishments is normally someone that does the front office duties on the graveyard shift, like checking in late arrivals and liaising with housekeeping for needed items. The night auditor has to be able to collect items from housekeeping or even prepare a meal for a guest if the need arises.

## 2.2 Uniformed services manager

The uniformed services division also falls under the front office. The uniformed services manager is the person responsible for the switchboard, porters and concierge. They have to ensure that the switchboard is in working condition.

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The uniformed services manager also has to ensure that the correct amount of employees is scheduled for shifts taking into consideration the occupancy level of the hotel. The uniformed services manager also has to be aware of each service that has to be delivered to.

It is imperative that fast and effective services are rendered to guests and that there is constant communication between employees to ensure that services have been concluded. The uniformed service manager should also oversee the bookings the concierge makes and ensure that guests' are satisfied. The uniformed services manager also handles complaints regarding the establishment if the front office manager is not available.

### *2.2.1 Switchboard agent*

The switchboard agent is the person that ensures that all calls are answered. Not all establishments have a switchboard and the calls are answered directly by reservations or front desk. As the switchboard agent is the first contact a guest has with an establishment, the person has to be friendly, professional and speak clearly. The switchboard agent is also responsible for making outgoing calls for guests and needs to ensure that the right amounts are charged to the guest's folio.

The switchboard agent may never leave the phone unattended. The switchboard agent should ensure that wake-up calls are done on time and in a professional manner. The switchboard agent should also take messages and make sure it reaches the correct guest. The switchboard agent should know what action to take when an emergency call is requested or received and act accordingly.

### *2.2.2 Porter*

In many American establishments a porter is known as a bellhop. The name bellhop was derived from the fact that the hotel's front desk agent rang a bell to call upon an employee, who would "hop" to attention at the desk to receive instructions. The term porter is used in the United Kingdom, and most of the English-speaking world. The porter is normally a male, as he has to carry heavy items for guests and the establishment.

The porter is called upon to carry guest luggage. In some establishments the porter will also show the guest to their room. Porters collect luggage from the guest's room upon checkout. The porter also assists the establishment with items that have to be moved or put into storage. The porter is the person who has knowledge about the storage room, the items therein, which items have been stored for what length of time and the reason therefor.

### 2.2.3 Concierge

A concierge assists guests with various tasks like making restaurant reservations, arranging spa services, recommending night life hotspots, booking transportation, procuring tickets to special events and assisting with travel arrangements and tours of local attractions. In some establishments the concierge may also be responsible for newspaper deliveries to the rooms of guests.

As the concierge should know the 'right' people they are usually able to secure tickets rare tickets for special events. Concierges should be friendly, well-spoken, courteous, and knowledgeable. The concierge could be requested by management to organise special events for the establishment.

## 2.3 Food and beverage division

As indicated before the front of house section is visible to guests. The restaurant and the kitchen cannot exist without each other, and are respectively managed and run by the food and beverage manager and the executive chef. The food and beverage division has a number of employees that depends on the size of the establishment, for example catering manager, banqueting manager, beverage manager and restaurant manager.

Each manager has a number of staff that report to them. The executive chef has a head chef, sous-chef and other kitchen employees to manage. The food and beverages manager has the catering manager, banqueting manager, beverage manager and restaurant manager reporting to them. This will be elaborated upon in the section below.

### 2.3.1 Food and beverage manager

The food and beverage (F&B) manager is responsible for all food and beverages service and has to communicate with the kitchen on a regular basis throughout the day. The F&B manager oversees the catering department, banqueting department, beverage department and restaurant. Each of these departments has a supervisor that reports back to the F&B manager. The F&B manager has to ensure that the operating budget is correctly allocated and that budget goals are met.

The F&B manager plans and approves external and internal marketing and promotions in the food and beverage department. The F&B manager has to inspect all safety, sanitation, energy management and preventive maintenance. The F&B manager is responsible for the orientation and training of new staff in their department, and for development of existing employees, for example

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by having wine and food pairing so the employee can make recommendations to guests.

The F&B manager plans and approves the schedules of employees and manages the long-range employee scheduling needs for the department. Employee records need to be maintained by the F&B manager. They are also to regulate the appearance of employees and their adherence to the dress code. This also applies to the upkeep and cleanliness of all equipment and includes periodically checking the crockery, cutlery and glassware inventory and replenishing it if need be.

The F&B manager works hand-in-hand with the executive chef to develop menus. The F&B manager need to establish the quality and quantity output standards for the food and beverage department. The F&B manager also monitors the purchasing and receiving of stock and develops the wine list (if the establishment does not have a sommelier). The F&B manager approves all invoices before handing them to the accounting department. The F&B manager manages the physical inventory and provides updated information regarding the inventory to the accounting department. The F&B manager is responsible for the proper accounting and reconciliation of the point of sale system. Daily, or at least weekly, report sheets should be distributed by the F&B manager to ensure all the employees are aware of events and functions occurring at the establishment. The F&B manager should maintain records of special events, food cover and daily business volumes.

The F&B manager has to ensure timely correspondence with the catering and banqueting departments, if the establishment has such departments. The F&B manager approves all entertainment and that reservations are correct. Depending on the system used by the establishment, the F&B manager has to ensure that the food and beverage accounts of guests are sent to the front office so that it could be added to the guest's folio. The F&B manager should also handle all the employee and guest-related complaints.

### **2.3.2 Restaurant employees**

Restaurant employees may include the following:

- A sommelier or wine steward is a trained and knowledgeable wine professional, normally working in fine dining restaurants. The most important work of a sommelier is in the areas of wine procurement, wine storage, wine cellar rotation, and expert service to wine consumers. A sommelier may also be responsible for the development of the wine list, the delivery of wine service and training of other restaurant staff. Working along with the

executive chef, suggestions can be made on food and wine pairing. The work of the sommelier requires expert knowledge of how food and wine, beer, spirits and other beverages work in harmony. A professional sommelier works on the floor of the restaurant and is in direct contact with guests. In modern times, a sommelier's role may be considered broader than working only with wines, and may encompass all aspects of the restaurant's service, with an enhanced focus on wine, beer, spirits, soft drinks, cocktails, mineral water and even tobacco.

- The duties of the *maître d'hôtel* (headwaiter or restaurant manager) includes supervising the waiting staff, welcoming guests, assigning tables, making reservations, and ensuring that guests are satisfied. The *maître d'hôtel* should ensure the smooth flow of communication between the kitchen and the dining room. The *maître d'hôtel* is responsible for adding the guest account to the guest folio if the F&B manager does not do it.
- A waiter is the person that attends to the guests, takes food and drink orders and offers information and suggestions regarding the menu. A server/waiter collects food from the kitchen and serves it to guests. The waiter prepares the bill and takes payment therefor (if it is an outside guest or the guest does not want it added to the guest folio).
- A busser is the person who cleans tables and sets them again.
- A bartender is a person who serves beverages, alcoholic or non-alcoholic, in a licensed establishment. Bartenders need to maintain the bar's inventory. A professional bartender should develop a palate to distinguish different flavours, which in turn gives them the ability to mix and create cocktails and other specialty drinks.
- If customers are seated at the bar, the bartender is usually responsible for confirming that customers meet the legal drinking age before serving them alcohol.

### 3. Back of house

The back of house includes employees that guests do not see. This section will focus on the kitchen staff, as well as housekeeping and maintenance staff.

#### 3.1 Executive chef

The executive chef, or *chef de cuisine* in the traditional French, is in charge of all things related to the kitchen, which usually include menu creation, management of kitchen employees, ordering, purchasing, controlling and

receiving of inventory. The executive chef is responsible for scheduling kitchen staff in relation to occupancy or functions booked. The executive chef should also check each plate of prepared food leaving the kitchen to ensure it meets the required standards.

The executive chef should continuously experiment with new techniques of food preparation and presentation to ensure that the menu remains varied and interesting. The executive chef oversees the production of food and assists other chefs where needed. The executive chef should have a vast knowledge of all the areas in the kitchen and be acquainted with the roles and functions of the employees working there.

### 3.2 Kitchen employees

The sous-chef is usually second-in-command and the immediate assistant of the executive chef. The sous-chef is responsible for scheduling the kitchen staff, if needed, and substituting when the executive chef is off-duty. The sous-chef can also assist the other chefs where needed. The Sous-chef is responsible for the kitchen's inventory, cleanliness, organisation, and the training of staff.

A sous-chef's duties can also include carrying out the executive chef's instructions, conducting line checks, and overseeing the timely rotation of all food products. Smaller operations may not have a sous-chef, just an executive chef who will conduct the duties of both executive and sous-chef.

A *chef de partie*, also known as a "station chef" or "line cook", is in charge of a particular area of production, for example fish, meat, starters etc. In most kitchens, however, the station chef is the only worker in that department. A *commis* is a basic chef in larger kitchens who works under the *chef de partie* to learn the station's responsibilities and operation. A *commis* may be a qualified chef still undergoing practical training. A *saucier* is responsible for all sautéed items and sauces.

A *poissonnier* prepares fish dishes and often does all fish butchering, as well as preparing appropriate sauces. A *rôtisseur* prepares roasted and braised meats and the appropriate sauces. This station may combine a *saucier* position that of the *rôtisseur*. A *grillardin* cooks all grilled foods, and may also be combined with the *rotisseur*. A *friturier* prepares all fried items, and this position may be combined with the *rotisseur* position as well. In other words, in smaller establishments the *rôtisseur* station could be responsible for roasted, grilled and fried foods, as well as the sauces for these dishes.

The *entremetier* cooks hot appetisers and often prepares the soups, vegetables, pastas and starches. The *potager* makes soups and the *legumier* prepares vegetables in a full brigade system. In smaller establishments the tasks of *potager* and *legumier* may be handled by the *entremetier*. The *tournant* is referred to as a swing cook and fills in as needed on stations in the kitchen. The *garde-manger* is responsible for preparing cold foods, including salads, cold appetisers, pâtés and other charcuterie items – this is the branch of cooking devoted to prepared meat products, such as bacon, ham, sausage, terrines, galantines, pâtés and confit. Charcuterie was originally intended as a way to preserve meat before the introduction of refrigeration.

The *boucher* butchers meats, poultry and sometimes fish. The *pâtissier* makes baked goods such as pastries, cakes, breads and desserts. In larger establishments, the pastry chef often supervises a separate team in their own kitchen. The potwash is responsible for washing pots, pans and cooking utensils and the dishwash is responsible for the washing of crockery and cutlery.

Glasses are normally washed at the bar by the barman. All the kitchen employees and chefs are responsible for cleaning the kitchen after service on a daily basis. Deep cleaning should be done once a week, where all vents, extractor fans and gas stove plates are removed and washed to ensure all areas are hygienically clean.

### 3.3 Maintenance manager

The primary focus of the maintenance manager is to supervise the maintenance activities and gardening duties of the establishment. The maintenance manager plans, organises and supervises the establishments' maintenance operations and coordinates, assigns and directs daily, weekly, monthly and yearly schedules. This includes staffing rosters, as well as establishing job priorities and time frames for completing projects. The maintenance manager is responsible for the installation and/or repair of electrical systems and schedules, and supervises maintenance activities within the establishment, including work performed by contractors.

The maintenance manager monitors the completion of job assignments through frequent field observation and inspections to ensure compliance with standards. Instructions and time frames may be revised when necessary. The maintenance manager also serves as the safety representative and coordinates safety training, assists with safety audits, facilitates compliance with safety standards and maintains related safety records. The maintenance manager develops specifications and makes recommendations on capital equipment

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purchases such as sweepers, lawnmowers etc. The maintenance manager maintains appropriate documentation of maintenance schedules, equipment installations, structural repairs, work orders and other operating reports. The maintenance manager also manages the maintenance budget which includes monitoring inventory and expenses related to the garden.

The maintenance manager should have a comprehensive knowledge of current practices and procedures involved in the maintenance and repair of items within the establishment. The maintenance manager is also responsible for supervising the hiring and disciplinary actions of maintenance agents and gardening employees. The maintenance manager is also responsible for training employees on the maintenance and use of equipment, the appropriate procedures to follow, the work standards that apply and proper safety procedures.

### ***3.3.1 Maintenance agents***

The primary focus of the maintenance agent is to conduct maintenance activities within and around the establishment. Maintenance agents are accountable for the installation and repair of broken items. Maintenance agents should comply with standards, instructions and time frames. The maintenance agent should have comprehensive knowledge of procedures involved in the maintenance and repair of items, which may vary from broken items to installing a light bulb. It is also advisable that maintenance work is carried out in the presence of housekeeping employees to ensure that no claims for missing items could be made.

### ***3.3.2 Gardeners***

The gardener usually operates under the general supervision of the maintenance manager (if the establishment does not use gardening services). The gardener maintains the establishment's gardens and grounds. A head gardener may be appointed to assign tasks to the other gardeners. The gardener should water plants and shrubs and always monitor irrigation. The gardener should also perform seasonal landscape work, including pruning, bulb planting, dividing and transplanting, leaf removal and overall cleaning. The gardener should also scout for pests and diseases and make sure it is treated accordingly. The gardener is also responsible for the pot plants within the establishment and all equipment used for gardening. Pool maintenance can also be included as part of the duties of a gardener. The head gardener should assist with the training of seasonal gardeners and interns in the establishment's garden. A gardener

should document, report and catalogue plant-related information and ensure that all the gardeners are working in the same direction.

#### **4. Executive housekeeper**

The executive housekeeper plans the work for the housekeeping department and distributes assignments accordingly. The executive housekeeper assigns regular and special duties to housekeeping staff, and handles the scheduling of employees. The executive housekeeper maintains a logbook of all employees within the department to ensure labour requirements are met and that proper scheduling of employees regarding the “house count” or occupancy.

The preparation of daily time and duty sheets is one of the primary functions the executive housekeeper. The executive housekeeper is responsible for budgeting labour costs and, if there is no accounts department, completing the weekly payroll input. They must ensure that all employees are properly trained and prepared for the duties that they need to perform.

The executive housekeeper must following the establishment’s purchasing policies and is responsible for ordering all supplies used by the room attendants. The executive housekeeper should follow proper receiving and storage protocols and keep the housekeeping manual, which indicates what has to be done on a daily, weekly or monthly basis. It is imperative that weekly meetings be scheduled with subordinates to discuss problems and challenges. The executive housekeeper should do regular inspections and spot checks to ensure the standard of the establishment is maintained.

##### **4.1 Inspector**

The inspector reports to the executive housekeeper. The inspector is responsible for daily room and public area cleaning, maintenance and inspections to ensure that acceptable establishment standards are met. The inspector ensures that room attendants do not enter rooms when do not disturb signs are out. The inspector also ensures that guests receive the items they request, like extra towels, coffee, milk etc. A general cleaning schedule should be developed and maintained by the inspector. It is the responsibility of the executive housekeeper and the inspector to make sure all employees are properly trained to apply the appropriate standards.

The inspector assists the executive housekeeper and can handle guest complaints. The inspector may also deal with issues like employee attitudes, their appearance and ensuring that employees are friendly and polite with

guests. The inspector has to consistently communicate with the executive housekeeper, laundry manager and room attendants.

The inspector should properly evaluate the room attendants' work and needs to pay particular attention to aspects like pest eradication, maintenance work that needs to be performed and updating the lost and found items in a logbook. The inspector should maintain the accuracy of the maintenance logbook and complete a weekly room inspection with maintenance tasks.

### 4.2 Room attendants

Room attendants should ensure that rooms are clean, hygienic and comfortable. It is therefore imperative that room attendants maintain a high standard of personal hygiene and appear professional at all times. Room attendants are likely to continuously come in contact with guests and they need to be friendly and accommodating. In most establishments the housekeeping department's shifts are from 08:00 until 17:00. However, in some establishments that have an in-house laundry the shifts are from 06:00 until 15:00 and from 15:00 until 23:00 to ensure all the linen is cleaned and dried.

Nigh shift employees are usually responsible for the turndown service, or any other cleaning service that guests might require. This especially applies to five star boutique establishments. Turndown is where the room attendant enters the room after the guest has left for dinner and folds open the bed, preparing it for use. Typically a chocolate or mint is left on the guest's pillow.

In five star establishments the room attendants will also tidy the room, clean the bathroom and leave fresh towels. The room attendants are responsible for making sure that they have all the supplies needed to service their work area. These include cleaning materials, cleaning equipment, linen and guest supplies.

Typical items room attendants require include:

- clean sheets and pillowcases;
- clean towels, bath mats and face cloths;
- toilet rolls, tissues, soap;
- glasses, mugs, tea, coffee etc.;
- all-purpose cleaner, mirror/glass cleaner, toilet cleaner;
- air freshener;
- garbage bags and bin liners;

- brushes, brooms, mops; buckets;
- feather dusters;
- cloths for wiping, drying, polishing;
- sponges;
- protective gloves;
- vacuum machine

Cleaning should occur at times that will not inconvenience guests, preferably after checkout and before check-in. Cleaning begins the moment the room attendant approaches the guest room door. If there is a do not disturb sign the attendant should leave quietly. If not, the room attendant should knock on the door and clearly announce themselves as housekeeping. If the guest answers, the room attendant will greet and introduce themselves and ask what time would be convenient for cleaning the room. The time should be noted on the room attendant status report or schedule. If the guest does not answer, the room attendant should again knock and announce themselves as housekeeping. If there is still no reply the room attendant may open the door slightly and again announce themselves to make sure the guest is not sleeping or in the bathroom. If the room is unoccupied the room attendant may begin cleaning.

The room attendant must position the cleaning trolley in front of the door or close to the wall at the side of the door, leaving the door open. The room attendant should turn on all lights, lamps, radio, TVs, air conditioners, fans and heaters to ensure they are working. They should note what needs attention and inform maintenance. The room attendant should open the curtains, lace curtains and windows to allow air circulation, and check curtain cords and hooks for repairs. They should also check the windows for breakage and dirt and respond accordingly. After departure room attendants should check area such as cupboards, drawers and wardrobes for guest belongings or lost property and report these according to the establishment's procedures.

Room attendants should check the general condition of the room and note any missing or damaged items to report to the inspector. Room attendants should remove the used linen, vacuum the carpets, dust the room on high and low areas, clean the fridge, cupboard and draws with a damp cloth, make the bed with fresh linen and then clean the bathroom. Should they notice marks or stains that need deep cleaning, they should apply the relevant cleaning agents.

The room attendant should always work from the corner remote from the door and end up at the door, the mopping of the floors always occurring last. Usually

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in small establishments the dirty glasses, cups, ashtrays etc. are taken to the kitchen and placed in the basin to soak, while in large establishments this is placed in the bathroom basin and cleaned there.

All rubbish should be placed in bins – room attendants should use protective gloves and additional wrapping such as newspapers to pick up and wrap items such as glass, razors, blades, syringes, sanitary items and other potentially harmful items. Whilst all areas need to be cleaned thoroughly, it is important to ensure the safety of the area that is cleaned and avoid inconveniencing guests.

Room attendants should keep noise to a minimum. They should further not obstruct passages or walkways and place cleaning materials and appliances safely out of the way of traffic. Room attendants should ensure that electrical cords are safely out of the way of people to avoid tripping. After cleaning, the room attendant should check that all cleaning items and equipment have been removed and return these to the designated storage area. The room attendant should then inform the inspector that the room is ready for inspection.

### 4.3 Laundry manager

The laundry manager is responsible for cleaning all types of laundry and placing restocking orders with the executive housekeeper. The laundry manager should also replace and distribute linen, towels and room amenities. As linen and supplies are expensive and one of the most important stock items in a hospitality establishment great care has to be taken of these items. The laundry manager is responsible for maintaining enough supplies of clean and quality linen to support the operation of the establishment.

Linen inventory levels are calculated according to the range of minimum and maximum requirements for any operation. The linen storage area must always be kept clean and organised to ensure stock levels can be monitored. All linen should be inspected using the following guidelines:

- thoroughly clean;
- no stains, marks or lint;
- no fading;
- no frayed or worn edges;
- no tears or broken seams;
- fresh-smelling;
- no signs of mould or mildew/

The laundry manager should count and check that dirty linen corresponds with the reports that room attendants completed. The laundry manager is also responsible to ensure all washing machines, dryers, irons etc. are in working condition and report any defects to maintenance. The laundry manager should ensure that the laundry attendants are trained to use the equipment and chemicals they work with. In small establishments the laundry could be collected and washed by a laundromat.

#### *4.3.1 Laundry attendants*

The laundry attendants are responsible for washing linen and towels and to treat stains with appropriate chemicals. Laundry attendants should be knowledgeable about water temperatures and be able to use the equipment in the laundry, like washing machines and rolling irons for the linen. They should wash and dry all linen and towels and report any damages to the laundry manager. They should also valet laundry as per guests' requirements, especially in large establishments, and make sure that it is charged to the guest's folio.

## **5. Summary**

The hospitality industry is about continuously providing a service to the satisfaction of paying customers. Any person working in the hospitality industry needs to be prepared to work in a demanding environment where customer satisfaction is a persistent concern. This theme detailed the various positions in a typical hospitality establishment in terms of the front of house and back of house sections.



# Financial controls and budgets

*Lisa-Mari Coughlan*

## 1. Introduction

The aim of any business is to generate income through the satisfaction of customer needs and wants. Thus, comprehending basic financial management principles and financial control systems is imperative for any business owner or manager. This theme will examine practical principals to be followed to ensure that financial control systems are adequately implemented in hospitality establishments. This includes effective financial planning, bookkeeping practices and financial controls.

## 2. Financial planning

As a business idea forms in the mind of an entrepreneur, business goals have to be determined. For example, the entrepreneur may aim to break even after the first year of operation and make a profit of at least R40 000 by the second year. Financial planning ensures that the organisation is able to make enough money to be sustainable in the long run.

The selection of any new business venture needs to be accompanied with sound budgeting. A budget is an estimation of all the business's income and expenditure for a set period of time. A budget should be calculated for five consecutive years in order to ensure sustainability. If calculations indicate that the start-up costs (including the property, furniture and vehicles) cannot be repaid within the first five years of opening the business, the entrepreneur should walk away from the venture. Hospitality businesses often require refurbishment in order to keep up with current trends and this should also be budgeted for in the long-term. For example, budget R50 000 in every five year cycle for new decor.

The goal of budgeting is to ensure that enough money is available to keep the business running, growing and secure. It is both a planning and a control tool.

There are many budgets which may assist in running a business effectively. This includes the cash budget, the pro forma statement of financial performance and the budgeted statement of financial position. A combination of these could be considered as the budgetary fundamentals and will be explained in the section below.

### **3. Budgets**

If the business has been operational for a while all the information required to draft budgets are available from previous financial records. Existing financial data could be scrutinised to estimate future income and expenditure patterns. Aspects like events taking place in the area, including music festivals or sport events, as well as school holidays, should also be considered. These events and holidays may increase the demand for certain services, such as accommodation or entertainment. During these high-demand periods, income and expenses will increase as additional stock will have to be purchased to satisfy the increased demands.

When a new business is contemplated, the budgeting process is more complex. No previous financial information is available and budgets will have to be compiled based on assumptions regarding income, expenditure and trading hours. For example, the business owner would need to calculate the hours the business will be open and according to this calculate the number of staff required and the wage or salary the employees will be paid.

Financial data from similar businesses can be used as a guideline. If existing businesses do not see a new business venture as a threat, they may be open and forthcoming in sharing financial information. Guest houses in different cities could establish a network where business tips and financial data are shared. If Guest House A in Johannesburg has found that swapping over to a new brand of linen or implementing a different booking system resulted in costs being cut, this information can benefit the other guest houses. In return, each other guest house owner can offer financial tips and tricks with which they have had success.

Similar establishments can also be visited and can provide insight into many aspects of the business, such as services and rates. If starting a restaurant is considered, the prospective owner could go and experience a meal at restaurants in the same area. Details such as what the menu constitutes of, the prices, the decor, the music and the lighting should be noticed. This type of information could be useful in positioning one's own business.

## Financial controls and budgets

Public companies, such as Spur and City Lodge, are required by law to share their financial statements on the internet. Information can be obtained from these financial statements, but should only be used as guidelines. The ratios (not the rand values) from public companies can be used to estimate figures on the smaller scale of a new business. For example, what were the water and electricity costs in comparison with the income? If, in the public companies studied, on average 20% (R400 000) of the income (R2 000 000) is spent on water and electricity, the entrepreneur can estimate that 20% of the business's income will also be spent on water and electricity.

A business owner needs to be the main financial planner and be in control of financial decisions, but seeking professional advice from a local accounting firm (for example PricewaterhouseCoopers or Newtons) is advised. These firms can assist with budgeting and could be contacted when planning a new business. Request quotations from a few financial suppliers and negotiate a rate. Many businesses fail because they do not have an auditor involved.

### *Tips for setting up budgets:*

Microsoft Excel may save a lot of time in drafting budgets. It can serve as a template ready to use for future budgets with embedded calculations. The following aspects are critical when setting up a budget:

- Allow sufficient time to prepare a budget and analyse the business's progress in terms of the budget. It is pointless to compile a budget just for the sake of luring investors. Set time aside to compare actual figures to budgeted figures.
- Always consider what the expenditure and income might be in a worst case scenario. Positivity is required when running a business, but it is unwise to predict an extravagant income and limited expenses that will only occur in optimum conditions.
- Monthly and annual budgets should be drafted. Many hospitality businesses experience volatile market conditions. Seasonality influences income and staying in a guest house or eating dinner in a restaurant is a luxury that can be circumvented when money is tight.
- Review the cost of suppliers periodically. Shopping around helps in making informed decisions. Even if the intention is not to replace existing suppliers, knowledge gained by shopping around can be used to negotiate better prices or terms with current suppliers.
- Additional to suppliers, there are other external influences on a budget to take note of. These include interest rates, taxation levels, license fees

and employment laws. For example, the minimum wage that hospitality employers with fewer than ten employees are allowed to pay is R2 601.88 per month, R600.48 per week and R13.34 per hour. Hospitality employers employing more than ten employees must pay a minimum of R2 900.08 per month, R669.30 per week and R14.87 per hour (South African Department of Labour, 2014). These amounts are updated annually and come into effect every July.

- The budget should be communicated to employees and problems or opportunities they may foresee should be taken into consideration.
- Avoid the temptation of spending all the money that was allocated to a specific expenditure. For example, if R20 000 was budgeted for office equipment for 2014, but only R14 000 was required, do not spend the additional R6 000 just because it was budgeted.
- The first draft of the budget might not be very accurate. It is necessary to leave room for error in the initial stages. The more experience is gained the more accurate the budget will become.

The disk accompanying this book contains a digital templates with formulas to enable budget setup.

### 3.1 Cash budget

A cash budget is an estimation of all the cash inflow and outflow for a specific period of time. A cash budget can serve as a warning tool if the business is approaching predetermined cash limits. Certain payments can be delayed (for example payments to creditors), but others, such as paying employees, cannot. Businesses require cash on hand in order operate successfully.

A cash budget is relatively easy to put together. It boils down to the following steps:

**Step 1:** Determine the length of time the budget should cover. Draw up an annual budget, which has been divided up into sub-budgets each covering one month. Thus, 12 monthly budgets are created. This allows adequate time to adjust the planning if liquid funds (cash or cash equivalents) are running low.

**Step 2:** Estimate cash sales and other possible cash inflow. A cash budget does not include, for example, credit sales in the month the credit sales were made. These amounts will only be captured in the cash budget when the debtor

(the individual/company who purchased from the business on credit) makes a cash payment.

**Step 3:** Estimate cash expenditure. Remember to analyse bank statements for any hidden costs, such as interest and banking fees for which physical accounts are not received. Take into consideration that the business might be busier over certain periods, such as Easter and December holidays. During these times the business might have higher cash expenditure due to casual staff, as well as additional running costs. Always calculate to have a cash buffer. An example of a cash budget can be found in Annexure 1.

### 3.2 Pro forma statement of financial performance

A pro forma statement of financial performance<sup>1</sup> provides the basis of control for all income and expenses. The pro forma statement of financial performance is used to calculate whether a profit or loss was made in a certain financial period. The main difference between a cash budget and a pro forma statement of financial performance is that the latter does not only deal with cash transactions, but with all income and expenses.

All expected incomes, such as sales (cash and credit), rent income, and interest and discounts received are added together to arrive at the total expected income. All expenses, such as purchases, water and electricity, maintenance, banking charges and taxation are subtracted from the total income. If the income exceeds the expenses a profit is expected for the budgeted period, but if expenses exceed income then a loss is expected. Annexure 2 illustrates the use of a pro forma statement of financial performance.

### 3.3 Budgeted statement of financial position

The budgeted statement of financial position<sup>2</sup> can be drawn up in order to keep track of everything the business owns with commercial or exchange value (assets), the amount of money personally invested by the owner (owner's equity) and the money owed by the business (liabilities).

When compiling the budgeted statement of financial position, the following accounting equation is utilised to ensure that bookkeeping errors are not made.

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1 The statement of financial performance was previously known as the income statement.

2 The statement of financial position was previously known as the balance sheet.

Assets = owner's equity + liabilities

**Calculating total assets:** The ending cash balance, which was calculated in the cash budget, is transferred to the assets section of the budgeted statement of financial position. This cash balance (called bank) is added to all the other assets of the business, such as land and buildings, expected debtors, vehicles, furniture and equipment etc. to calculate a total assets amount.

**Calculating total owner's equity:** The profit or loss calculated in the pro forma statement of financial performance is transferred to the owner's equity section of the budgeted statement of financial position. The profit or loss is added to the capital which the owner contributed to calculate the total value of owner's equity.

**Calculating total liabilities:** All debts the business expects to have are added together to calculate the total liabilities. These debt include creditors (companies we purchased from on credit), mortgage loans, SARS (South African Revenue Service) and UIF (unemployment insurance fund).

After the values for assets, owner's equity and liabilities have been calculated, the accounting equation is utilised to test for accounting errors. If the equation is unbalanced, for example assets equal R100 000, but liabilities and owner's equity together amount to R105 000, it is clear that an accounting error has been made and the three budgets compiled (cash budget, pro forma statement of financial performance and budgeted statement of financial position) should be scrutinised in order to locate the error. Annexure 3 illustrates the budgeted statement of financial position.

#### 4. Accounting cycle

After the budgets have been finalised and the day-to-day running of the business commences, the accounting cycle begins. The accounting cycle is a step-by-step process of recording, sorting and summarising the economic transactions of a business. The steps of the cycle are:

- A transaction takes place (collect the source document as proof that a transaction took place).
- Record the transaction in the journal applicable to the type of transaction which took place (cash receipts journal, cash payments journal, debtor's journal, creditor's journal or general journal).

## Financial controls and budgets

- Transfer the information from the journals into the general ledger.
- Prepare a pre-adjustment trial balance.
- Perform adjusting entries (correcting of accounting errors etc.).
- Prepare a post-adjustment trial balance.
- Perform closing entries.
- Prepare a final trial balance.
- Prepare financial statements.
- Analyse the financial statements and interpret the data obtained.

These ten steps can be completed biannually (or a shorter or longer financial period), after which the process starts over again in a new financial period. Crowther (2013:35-46) explains and illustrates the accounting cycle in *A practical guide to guest house management*. Should detailed notes on the topic be required it is advisable to study her work. If the business's needs involve only a basic bookkeeping system, the system described in section 5 of this theme should suffice. This system can be supplemented to suit individual needs.

### 5. A basic accounting system

The bookkeeping system described in this theme covers the financial planning which occurs prior to the accounting cycle (discussed in section 3), followed by steps one through ten of the accounting cycle. Here no journals or ledgers are used in order to save time and simplify financial matters. The activities are instead divided into things to do on a daily, weekly and monthly base. The accounting cycle includes many steps to ensure accounting errors were not made. When utilising the bookkeeping system described in this theme it is advised to appoint an external auditor to audit the financial records of the business on an annual basis to serve as the final assurance of financial accuracy.

#### 5.1 Daily accounting activities

Create a neat filing system in order to keep track of all transactions (receipts, proof of payments, invoices etc.). Make copies of source documents relating to debtors and creditors and use the copies of these source documents to complete the debtors and creditors ledgers, (discussed in subsection 5.2). All financial source documents should by law be kept for a period of five years. The statement of financial performance can be used to capture transactions on a daily basis, as in Annexure 2. Now, actual amounts are used to populate

the statement of financial performance instead of estimated amounts as was done when the pro forma statement of financial performance was compiled.

## 5.2 Weekly accounting activities

Once a week the transactions should be captured in the cash flow statement. The easiest way to find the applicable information is to log onto internet banking and retrieve the details regarding cash inflow and outflow from there. Supplement the cash budget with a column containing actual figures to serve as a basic financial statement of current cash flow. This is illustrated in Annexure 1. An additional column to calculate the variances is also useful. Investigate reasons for variances on a timely basis. The variance is calculated by subtracting the budgeted amount from the actual amount. If the answer is negative it means the actual amount was less than the budgeted amount. This might be a desirable or an undesirable variance, depending on whether it was an income or an expense. It is useful to calculate the percentage variance as well. Decide on an acceptable variance percentage. For example, if deciding on 5%, only investigate variances of more than 5%. Analyse these variances and adjust planning for the future if necessary.

Complete the debtors and creditors ledgers once a week. The debtors and creditors ledgers act as summaries of how much money each debtor owes and how much money is owed to each creditor. All credit purchases are recaptured in the creditor's ledger, along with cash payments made to the creditor and discounts received. All credit sales are recaptured in the debtor's ledger along with discounts allowed and cash received from debtors. These ledgers are explained by means of an example in Annexure 4.

## 5.3 Monthly accounting activities

Complete the statement of financial position once a month. Supplement the budgeted statement of financial position with a column of what actually happened. This statement serves as a summarised document of the financial standing of the business. For example, what percentage of the assets is funded by loans? Most of the information in this statement remains unchanged for an extended period of time. Amounts such as debtors, creditors, bank and inventory will, however, differ every month.

Based on the comparison of budgeted and actual amounts, financial decisions can be made for the future. These decisions could include increasing marketing efforts, keeping less stock on hand, relaxing credit policies for debtors (allowing an extra month for repayment, for example) etc.

## 6. Value-Added Tax (VAT)

VAT is the revenue raised for the South African government by requiring certain businesses to register and charge VAT on taxable supplies of goods and services. Vendors collect VAT on behalf of the government and this money never belongs to the business.

### 6.1 How does VAT work?

A vendor may deduct the tax incurred on purchased items or services (input tax) from the tax collected on the goods or services sold by the business (output tax). On some expenses, including the purchase of cars and entertainment, input tax is denied.

The vendor reports to SARS at the end of every tax period with a VAT 201 vendor declaration return. The input tax incurred is offset against the output tax collected and the balance is paid to SARS. It sometimes occurs that the business qualifies for a tax refund. This happens, for example, where the vendor has incurred more VAT on expenses than has been collected on sales.

### 6.2 Who must register as a VAT vendor?

Persons or businesses who sold taxable supplies and/or services in excess of R1 000 000 in any consecutive 12-month period are liable for compulsory VAT registration. A person or business may choose to register voluntarily, provided that they sold goods or services in excess of R50 000 in the past 12-month period. The total receipts for the supply of commercial accommodation must exceed R60 000 in a period of 12 months before the business will be able to voluntarily register as a VAT vendor.

### 6.3 How to register as a VAT vendor

The VAT 101 application for registration must be submitted in person at the SARS office nearest to where the business is situated. Alternatively a registered tax practitioner may appear in person on behalf of the applicant. It is very important that the correct documents are submitted with the application to register. Refer to the "guide for completion of VAT registration application forms" on the SARS website for a comprehensive list of documents that must be submitted.

The value-added tax guide for vendors (VAT 404) is available for download on the website [www.sars.gov.za](http://www.sars.gov.za) and is available on the disk which accompanies this book.

## 7. Financial control

Financial control is necessary in order to ensure that the business's objectives and goals are attained. Budgeting is an integral part of the financial control process. Budgeting allows planning for the future by setting goals and limitations. Financial control is the process of comparing budgeted figures to actual performance and analysing the differences. Action can be taken to improve the future of the business. Additional to budgets, there are other important considerations relating to financial control. Some recommendations relating to control include the following:

- Complete background checks on employees before hiring them.
- It is especially important when the employee will be working with money. Phone the references of every prospective employee.
- Have more than one person involved with every financial task.
- Never let only one person deal with a financial transaction from beginning to end. Involving more than one person reduces the chances of theft and fraud. For example: Employee A deals with reservations and receives deposits and payments where applicable, while Employee B verifies the amounts and reconciles the bank statements.
- *Let employees sign for the cash float at every shift change.* In this way employees become responsible for one another.
- *Set limits of spending authority of employees.*
- For example, supervisory employees are allowed to spend up to R500 per day without prior approval, but they need to report this spending in a weekly report along with receipts. Managerial employees are allowed to spend up to R3 000 per day without prior approval, but they need to report this spending on a weekly bases along with receipts. Any spending above the limits requires preapproval from a manager or owner.
- Set a formalised refund policy.
- Compile a thorough policy outlying which levels of employees are allowed to refund dissatisfied guests their money.

## Financial controls and budgets

- Set a strict debtors policy.
- Set a credit limit for all debtors. For example, they may not owe more than R10 000. When they reach the set limit they must pay off the amount, before they can make more debt.
- Know the 'numbers' of the business in order to quickly recognise abnormalities.
- Red flag abnormal amounts and follow up on them immediately. If the water and electricity bill averages around R20 000 a month and is suddenly R10 000 more the matter should be urgently investigated.
- Appoint an auditor to assist in filing the taxes. Taxes are complicated; an auditor might save the business lots of money by claiming the optimum amount back on taxes paid.

Note: Substantial financial gain should be the aim; otherwise starting a new business is not worth the risk. Bread and butter money should never be used to start a business. Do not use a pension fund to start a business, it is too risky!

## 8. Summary

In this theme, financial planning, bookkeeping and financial control were explained. If a budget is drafted conservatively, unpleasant surprises are less likely to be encountered at the end of a financial period. Keeping track of all income and expenditure will also provide more control over the running of an establishment.

## References

Crowther, D. 2013. Basic financial management. In: D. Kock (ed.). *A practical guide to guest house management*. Bloemfontein: SUN PRESS. 35-60.

## Annexure 1: Cash budget and cash flow statement

### Example

Use the given information to prepare the cash budget of a guest house for three months ending November 2014

*Actual information obtained from previous months:*

	June	July	August
Total sales	500 000	550 000	600 000
Total purchases	275 000	288 000	310 000
Cash in bank account 31/08/2014			18 200

### Additional information

#### Sales

- 55% of total sales are on credit. Sales are expected to continue increasing. It is expected to increase with 10% a month every month.
- According to previous years, creditors settle their account as follows:
  - 50% in the month after purchase.
  - 40% in the second month after purchase.
  - 7% in the third month after purchase.
  - 3% written off as bad debt after 120 days.
  - It is the Guest House's policy to allow a 10% discount on all cash sales.

#### Purchases

- All purchases are on credit, and it is expected to increase with 7% in September, October and November.
- Creditors are paid after 30 days to take advantage of 10% discount.

#### Other transactions

- Monthly salaries amount to R18 000 (R8 000 for a manager and two receptionists at R5 000 each), with an annual increase of 7% taking place in October every year. Monthly wages are usually calculated at 3% of total sales (wages for cleaners and waiters will increase when you experience an increase in sales).
- A loan of R20 000 is planned in case of cash flow emergencies due to the low current bank balance. R5 000 of the loan is expected to be paid off on the last day of November. Interest on the loan is 13% per annum.
- The water account is expected to be R3 000, and electricity R13 000, a month.

## Financial controls and budgets

- Comprehensive insurance cover amounts to R2 200 a month.
- The telephone account is forecasted at R1 300 a month.
- Furniture to the value of R25 000 will be purchased in September.

After the budget has been drafted, complete the column with September's actual data on a weekly base. Random figures were inserted into this example in order to illustrate the functioning.

### *Solution*

Cash budget	Sept. budget	Sept. actual	Oct. budget	Oct. actual	Nov. budget	Nov. actual
Beginning cash balance	18 200.00	18 200.00	108 903.33	118 143.33	217 661.67	118 143.33
Add cash Inflow:						
Cash receipts from debtors	84920.00	83 000.00	97 240.00		103 730.00	
Cash sales	85 500.00	83 000.00	90 000.00		94 500.00	
Loan proceeds	20 000.00	20 000.00				
Other:						
Total cash inflow	190 420.00	186 000.00	187 240.00	0.00	198 230.00	0.00
Available cash balance	208 620.00	204 200.00	296 143.33	118 143.33	415 891.67	118 143.33
Less cash outflow:						
Cash payments to creditors	31 500.00	31 500.00	33 705.00		36 064.35	
Cash purchases (cost of sales)	0.00	10 000.00	0.00		0.00	
Salaries	18 000.00	18 000.00	19 260.00		19 260.00	
Wages	5 700.00	6 000.00	6 000.00		6 300.00	
Insurance	2 000.00	2 000.00	2 000.00		2 000.00	
Water and electricity	16 000.00	17 000.00	16 000.00		16 000.00	
Telephone	1 300.00	1 340.00	1 300.00		1 300.00	
Interest on loan	216.67	216.67	216.67		216.67	
Loan principal					5 000.00	
Furniture purchases	25 000.00					
Total cash outflow	99 716.67	86 056.67	78 481.67	0.00	86 141.02	0.00
Ending cash balance	108 903.33	118 143.33	217 661.67	118 143.33	329 750.65	118 143.33

Calculate the cash received from debtors and the cash paid to creditors as below. The total cash receipts from debtors and total cash payment to creditors are then copied into the cash budget (on the previous page).

Budgeted debtors collection schedule	Credit sales	Receipt due dates	Cash receipts in Sept.	Cash receipts in Oct.	Cash receipts in Nov.	
June	66 000	50% July				
		40% Aug				
		7% Sept	4 620			
July	77 000	50% Aug				
		40% Sept	30 800			
		7% Oct		5 390		
August	99 000	50% Sept	49 500			
		40% Oct		39 600		
		7% Nov			6 930	
September	104 500	50% Oct		52 250		
		40% Nov			41 800	
		7% Dec				
October	110 000	50% Nov			55 000	
		40% Dec				
		7% Jan				
November	115 500	50% Dec				
		40% Jan				
		7% Feb				
Total cash receipts			84 920	97 240	103 730	
Budgeted creditors payment Schedule	Credit purchases	Payments in Sept.	Payments in Oct.	Payments in Nov.		
June	25 000					
July	28 800					
August	35 000	31 500				
September	37 450		33 705			
October	40 072			36 064.35		
November	42 877					
Total cash payments		31 500	33 705	36 064.35		

## Annexure 2: Pro forma statement of financial performance and the statement of financial performance

### Example

The actual data is captured on a daily bases. A lot of the data might be similar to that in the statement of cash flows. The only additional expense in this example is bad debt, as it does not have any effect on your bank account. Variances are analysed.

### Solution

Income and expenditure (September)	Budget	Actual	Variance	% Variance	Notes
Sales	190 000	166 000	-24 000	-12.63%	More marketing required?
Less cost of sales (purchases)	37 450	38 000	550	1.47%	
Gross profit	152 550	128 000	-24 550	-16.09%	Why did purchases increase when sales decreased?
Add other income					
			0		
Total other income	0	0	0		
Less expenses					
Salaries	18 000.00	18 000.00	0	0.00%	
Wages	5 700.00	6 000.00	300	5.26%	
Insurance	2 000.00	2 000.00	0	0.00%	
Water and electricity	16 000.00	17 000.00	1 000	6.25%	Investigate
Telephone	1 300.00	1 340.00	40	3.08%	
Interest on loan	216.67	216.67	0.00333333	0.00%	
Bad debt	1000	1000	0	0.00%	
			0		
Total expenses	44 216.6667	45 556.67	1 340.00333		
Net income before taxation	108 333.333	82 443.33	-25 890.003		
Taxation	2000	2000	0		
Net income after taxation	106 333.333	80 443.33	-25 890.003	-24.35%	

## Annexure 3: Budgeted statement of financial position and the statement of financial position

### Example

Information from the statement of financial performance is used along with addition information such as the value of property and equipment.

### Solution

Statement of financial position (September 2014)	Budget	Actual	Variance	% Variance	Notes
<b>Assets</b>	<b>5 653 133.333</b>	<b>5 663 143.33</b>			
Bank	108 903.33	118 143.33	9 239.996667	8.48%	Can we invest the surplus cash or pay off some debt?
Debtors	54 230	53 000	-1 230	-2.27%	Are our credit policies too strict?
Property	5 000 000	5 000 000	0	0.00%	
Vehicles	50 000	50 000	0	0.00%	
Equipment	120 000	120 000	0	0.00%	
Furniture	300 000	300 000	0	0.00%	
Inventory	20 000	22 000	2 000	10.00%	
Investments			0		
<b>TOTAL ASSETS</b>	<b>5 653 133.333</b>	<b>5 663 143.33</b>	<b>10 009.99667</b>	<b>0.18%</b>	
<b>Equity</b>	<b>1 592 483.333</b>	<b>1 602 493.33</b>	<b>10 009.99667</b>	<b>0.63%</b>	
Profit/Loss	106 333.3333	80 443.33	-25 890.00333	-24.35%	
Capital	1 486 150	1 522 050	35 900	2.42%	
Drawings (insert negative amount)			0		
<b>Liabilities</b>	<b>4 060 650</b>	<b>4 060 650</b>	<b>0</b>	<b>0.00%</b>	
Short-term loan	20 000	20 000	0	0.00%	
Mortgage loan	4 000 000	4 000 000	0	0.00%	
Creditors	37 450	37 450	0	0.00%	
SARS	2 000	2 000	0	0.00%	
UIF	1 200	1 200	0	0.00%	
<b>TOTAL EQUITY AND LIABILITIES</b>	<b>5 653 133.333</b>	<b>5 663 143.33</b>	<b>10 009.99667</b>	<b>0.18%</b>	

## Annexure 4: Debtors' ledger and creditors' ledger

### *Example of a debtors' ledger*

John Wayne is a regular debtor (he has signed a legally binding document with the Guest House, allowing him to purchase from us on credit) of the Guest House. The following transactions took place regarding his account in September 2014:

- 3 September 2014: John stayed in the Guest House and charged his bill of R2 400 to his open account. We issue Invoice number 043.
- 5 September 2014: John phoned the Guest House to say that he realised he has been charged for a dinner which he did not have. We apologise for our error and send Debit note 021 to deduct the amount of R80 from John's account.
- 20 September 2014: John pays the outstanding amount of R2 320 into our bank account.

### *Solution of a debtors' ledger*

Debtor name	John Wayne	
Contact details	083 123 1234	
Date	Details/Document	Amount
3-Sep-14	Invoice 043	2 400
5-Sep-14	Debit note 021	-80
20-Sep-14	Bank statement	-2 320
Total due to us		0

### *Example of a creditors' ledger:*

The Frozen Food Deli is one of the Guest House's creditors (the Guest House has signed a legally binding document with the supplier in order to make credit purchases). The following transactions took place regarding our account with Frozen Food Deli in September 2014:

- 1 September 2014: We purchase goods to the value of R3 300. Receive Invoice number FF72.
- 8 September 2014: We purchase goods to the value of R3 600. Receive Invoice number FF85.
- 15 September 2014: We purchase goods to the value of R3 000. Receive Invoice number FF94.

- 22 September 2014: The Guest House makes a cash payment of R9 000 to the Frozen Food Deli. We received a 10% discount for early payment. Receive Receipt 0082.

*Solution of a creditors' ledger*

Creditor Name	Frozen Food Deli	
Contact Details	021 123 1234	
Date	Details/Document	Amount
1-Sep-14	Invoice number FF72	3 300
8-Sep-14	Invoice number FF85	3 600
15-Sep-14	Invoice number FF94	3 000
22-Sep-14	Payment (Receipt 0082)	-9 000
22-Sep-14	Discount (Receipt 0082)	-900
Total owed by us		0



# Food service control systems

*Jacques Ras*

## 1. Introduction

The effective management of financial resources is critical to the success of any hospitality establishment. It is therefore important that key concepts related to food service systems in the hospitality industry be understood. It is important that managers should learn to use a variety of administration documentation available to analyse the financial status of a hospitality organisation. Systems used must be designed to provide quantitative data on the operations of a hospitality organisation. It is also important that administration systems provide internal reporting to managers for use in planning and controlling routine operations.

A food service system can be defined as an entity composed of subsystems, designed to function together to accomplish specific objectives. There are several units or components in any food service system that are responsible for the overall functioning and fulfillment of objectives. Although these food service units vary in size, they are all interrelated. For example, hygiene, food storage, and service are different types of units that simultaneously work together to fulfil set objectives.

A food service system can also be defined as an integrated program in which procurement, storage, preparation, food and beverage service, equipment and methods required to accomplish objectives are fully coordinated and integrated. These activities should ensure the optimum utilisation of labour, customer satisfaction, quality and cost control. In the past conventional approaches have seldom considered food services as entities composed of interrelated systems. Technological advancement and sophistication have made it imperative to consider food service from a systems point of view and this trend is gaining increased attention. It should be noted that the term “food service system” is frequently and incorrectly used to describe a subsystem and is often confused with the food service delivery system.

## 2. Types of food service systems

A system can be described as a set or arrangement of activities related to a larger whole, or as a systematic way of doing something. It can be understood by comparing the term “system” to the human body, where a number of organs are working independently for the welfare of the entire body. A system is thus comprised of separate subsystems working together to comprise a single, holistic function. Examples of systems include cars, watches or television sets.

### 2.1 The conventional food service system

In the conventional food service system, the bulk of food is purchased raw and very little falls into the convenience foods category. Facilities are provided for the receiving and storage of goods, the preparation, cooking and service of food, and for washing and swill removal.

Activities usually reach their peak before the serving of each meal. This also applies to the usage of equipment and labour. Electricity and gas appliances are often turned on in the morning and left on during the day, which can be uneconomical. Overall it is an expensive way of operating a food service system because of the staff needed to operate it, and its space, equipment and energy requirements. The conventional food service system is mostly used in the hotel, restaurant and guest house industry.

### 2.2 The commissary food service system

Commissary food service systems have central food purchasing and production functions with distribution of prepared menu items to several remote areas for final preparation and service. The actual food product flow varies with different commissary variations. The common feature of all commissaries is that the food production centre and service areas are situated in separate facilities. Therefore, the function of food distribution must receive significant emphasis for the efficient operation of these food service systems. The term “satellite food service” is sometimes used synonymously with commissary food service systems.

### 2.3 The cook-freeze food service system

The term “cook-freeze” refers to the full preparation of food, followed by fast freezing and storage at a controlled low temperature of  $-18^{\circ}\text{C}$  or below. This is followed by subsequent complete reheating close to the consumer prior to consumption. The service of the food should follow the regeneration as soon as possible, with the temperature strictly controlled and not allowed to

fall below 63°C. Food such as cold desserts will only require thawing prior to serving, but must be held in chiller cabinets until served. Any foods that have been regenerated and not consumed must be discarded and not reheated or returned to a refrigerator.

### 2.4 The cook-chill system

The term “cook-chill” refers to a system based on the full cooking of food followed by fast chilling, with storage in controlled low storage temperature conditions just above freezing point between 0-3°C. This is followed by subsequent complete reheating close to the consumer prior to consumption. It has a short shelf life (roughly five days including the day of production, distribution time and regeneration) compared to cook-freeze.

### 2.5 The convenience food service system

Convenience foods can easily be introduced into a conventional food service system. Conventional production using convenience foods may range from a limited to an almost complete dependence on the use of a wide variety of convenience foods now available. However, the best use of such convenience foods can only be by means of an organised food service system. It is basic to the systems approach that the operation is considered as a whole, taking into account the probable effects that a change in one part of the system might have on another part. Consequently, if convenience foods are to be introduced into a conventional food service previously using only fresh produce, the effects upon labour, equipment, space and, more importantly, the customer, should all be considered.

The functioning of a food service system has many components that need to be comprehended as a whole. Figure 2 shows the various components of the integrated food service system.

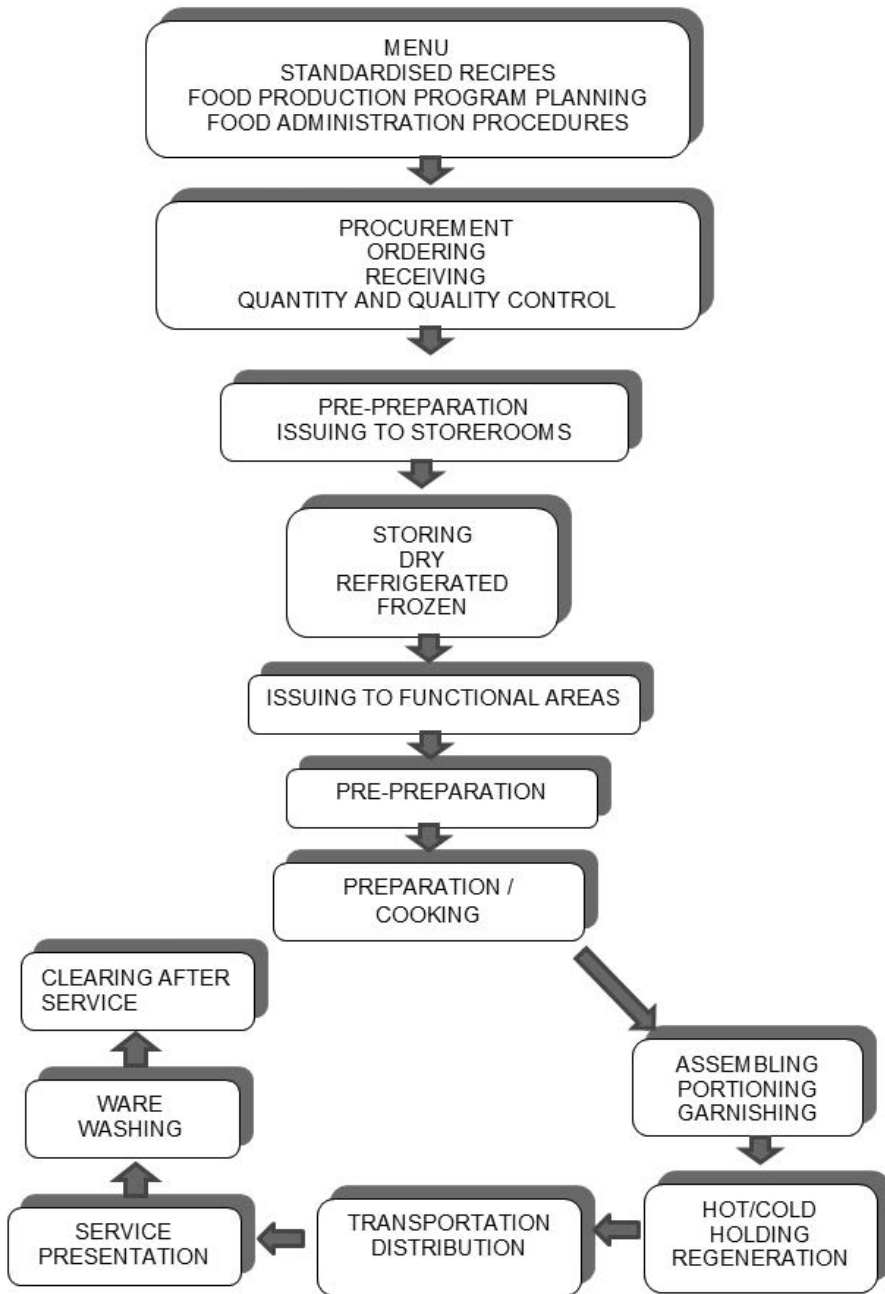


FIGURE 2 The integrated food service system

### 3. Integrated food service components

The next section will explain the components of the integrated food service system.

#### 3.1 Menu

The menu is central in the decision-making process of any food service operation and determines the food service system type, the décor, business hours, production and service procedures. The following factors will be determined by the type of menu chosen:

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<b>Budgets</b>	– Set cost and price policies – Identify specific control centres
<b>Purchasing</b>	– Set specifications – Determine receiving and control procedures
<b>Stock control</b>	– Security of stock on hand – Prevention of waste – Loss and fraud
<b>Production</b>	– Planning – Measurable performance – Consistent standards
<b>Equipment and staffing</b>	– Tailored to menu – Production and service needs
<b>Quality control</b>	– Standardisation of recipes, methods and yields – Service and billing procedures
<b>Pricing</b>	– Calculation of food cost – Markup and selling price calculations
<b>Service</b>	– Revenue and income

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When you have to choose menu items the ingredients must be easily available and cost-effective in the food production process. The first step is to create daily and weekly menus. Ensure standardised recipes are created and followed. Ingredient choices are an excellent area for controlling food costs. In many instances it is more cost-effective to cook all ingredients from scratch. Furthermore, the food quality improves when items are freshly prepared.

#### 3.2 Standardised recipes

A standardised recipe is a written schedule for producing a particular menu item, specifying the name and quantity of the item to be produced, the ingredients necessary for its production, and the method of preparation. It may also include the costing of dishes, its nutritional value etc. Recipe costings

should be kept up to date. Basic recipes are produced without the detail of costing and usually contain a photo of the expected end product.

Standardised recipes alone will not guarantee excellent food quality, absolute yields and controlled food costs. The standardised recipe must be accompanied by the proper supervision of the correct use of the recipe in order to produce good results. The effectiveness of using standardised recipes therefore lies in the training of chefs and kitchen staff in the proper use of these recipes. Suggestions by kitchen staff to the chef indicating their initiative and support are essential in developing and using workable recipes.

A standardised recipe is a well-established formulation written in a set pattern in which the amounts and proportions of the ingredients and procedures of combining them should constantly produce a highly acceptable product, as well as a given number of portions of a particular size. A recipe is considered to be standardised for a food service operation only when it has been tested, evaluated, adapted for use and repeatedly prepared under the same carefully controlled conditions with consistent results.

Standardisation of recipes includes the standardisation of the:

- recipe format;
- ingredients (type, form and grade);
- equipment and utensils;
- work procedures and handling techniques;
- temperatures and times;
- total yield in weight, volume and/or number of portions;
- portion size in weight, volume and/or count;
- portioning and serving procedures

A standardised recipe should be:

- reproducible;
- easy to prepare;
- concise;
- interesting and pleasing to the senses;
- economical,

## Food service control systems

Factors to consider when selecting recipes:

- consumers and their requirements;
- acceptability of the menu item to the consumer;
- type of menu presented and food service system used;
- menu cost and food budget;
- availability of ingredients;
- complexity of techniques and skills required;
- time and labour intensity;
- skills and workload of existing food service personnel;
- number, type and capacity of equipment available;
- projected demand for a specific menu item.

The factor method is used to increase or decrease recipe yields in food preparation and cooking:

The desired yield of a recipe to be adjusted to the new yield must be divided by the known yield to obtain the basic factor. Multiplication of the known yield by this factor renders the desired yield. For example, to decrease the recipe yield from a known yield of 440 portions, to 100 portions:

$$\begin{aligned}\text{FACTOR} &= \frac{\text{Desired yield}}{\text{Known yield}} \\ &= \frac{100}{440} \\ &= 0.22\end{aligned}$$

Known ingredients of 440 portions x FACTOR = desired yield (100 portions)

Another example; to increase the recipe yield from a known yield of 440 portions to 680 portions:

$$\begin{aligned}\text{FACTOR} &= \frac{\text{Desired yield}}{\text{Known yield}} \\ &= \frac{680}{440} \\ &= 1.54\end{aligned}$$

The percentage method of increasing or decreasing recipe yields can also be used. The amount in weight of each ingredient is given as a percentage of the total weight of all the ingredients used for the recipe. Once the ingredient percentage has been established, it remains constant for all future adjustments. To increase or decrease the yield of a recipe, the percentage of each ingredient is multiplied by the new total yield required. For example, a recipe for salad dressing contains:

70% salad oil

28% vinegar

2% seasoning

Portion size as served = 5 ml

To calculate the amounts for:

240 portions	80 portions
Total yield required	Total yield required
240 x 5 ml = 1 200 ml	80 x 5 ml = 400 ml
70% of 1 200 ml = 840 ml	70% of 400 ml = 280 ml
28% of 1 200 ml = 336 ml	28% of 400 ml = 112 ml
2% of 1 200 ml = 24 ml	2% of 400 ml = 8 ml

Checking ingredients for proper ingredient ratios is simplified since they are given as percentages.

### 3.3 Costing a menu item

Costing items is imperative to the success of any hospitality business. There are computer programmes available to speed up the costing process. However, if one of these programmes is not available completing a manual costing sheet is the way to go. It is also possible to create your own efficient costing system by utilising a spread sheet program, such as Microsoft Excel, to compile costing sheets.

Always cost items exclusive of VAT. This is done because VAT has to be paid to SARS and does not belong to the establishment. You can calculate the price per item excluding VAT by taking the purchase price inclusive of VAT and dividing it by 1.14 (as the present VAT rate is 14%).

For example: R119.99 (incl. VAT) / 1.14 = R105.25 (excl. VAT).

## Food service control systems

Here follows a manual costing for a main course menu item of beef stroganoff served with a side salad. This method can be used for any food or beverage item.

**Step 1:** List all the ingredients needed for each component of your menu item, along with the quantity you purchased them in, the cost price excluding VAT and the quantity required for your recipe. Your supplier invoice will state which items are VAT exclusive. These are referred to as zero rated supplies in the VAT 404 guide and include items such as fresh fruit and vegetables, rice, cooking oil and eggs.

**Step 2:** Calculate the cost price per person, excluding VAT. In the “quantity purchased in” column, state for example you bought mushrooms in 250g packets even if less is used.

To calculate the last column (price per item) use the following formula: Purchase price / quantity purchased in x quantity required = Price per item

Recipe: Beef Stroganoff			Yield: 6	
Ingredient	Quantity purchased in	Purchase price (excl. VAT)	Quantity required	Price per item
Cake flour	12.5kg	89.06	10g	0.07
Beef rump steak	1kg	105.25	700g	73.68
Butter	500g	21.92	40g	1.75
Olive oil	1l	50	22.5ml	1.13
Onions	2kg	15	1 (170g)	1.28
Garlic cloves	1kg	64.98	2 cloves (12g)	0.78
Paprika	1kg	31.36	2g (1 tsp)	0.06
Button mushrooms	250g	18.98	400g	30.37
Dry white wine	3l	56.97	125ml	2.37
Beef stock	1kg powder	65.05	5g (to make a cup of stock)	0.33
Tomato paste	70g	3.24	34g (2 tbl)	1.57
Dijon mustard	200g	25.87	15g	1.94
Sour cream	250ml	10.52	62.5ml	2.63
Egg noodles	250g	13.15	250g	13.15
			Total cost:	131.11
			Cost/person:	21.85

Recipe: Salad			Yield: 4	
Ingredient	Quantity purchased in	Purchase price (excl. VAT)	Quantity required	Price per item
Garlic cloves	1kg	64.98	1 clove (6g)	0.39
Salt	1kg	7.99	5g	0.04
Mayonnaise	3kg	83.13	30g	0.83
Red wine vinegar	750ml	14.64	30ml	0.59
Olive oil	1l	50	90ml	4.5
Black pepper	100ml	23.24	5ml	1.16
Crisp lettuce	150g	10.99	75g	5.5
Celery	300g (20 ribs)	9.99	1 rib	0.5
Red onion	1kg	26	75g	1.95
Cherry tomatoes	400g	18.98	75g	3.56
Green olives	200g	9.64	70g	3.37
			Total cost:	22.39
			Cost/person:	5.6

To calculate the final price it would cost to serve one guest the complete dish, you will add the cost prices of all the items necessary for the dish. In this case,  $R21.85 + R5.60 = R27.45$  (final cost price). At this point you are welcome to add 10% on the cost price in order to cover garnishes ( $R27.45 \times 110\% = R30.20$ ).

### 3.3.1 Calculating a selling price

Selling prices can be calculated using a variety of methods. It is imperative to determine the correct selling price in order to cover all costs and still achieve the desired profit.

#### Step 1

Estimate the total restaurant sales for a month by calculating labour costs, food cost, overheads and the profit we wish to achieve.

Labour costs: R40 000 (Calculate the rate you are going to pay your employees per hour, the number of hours they will work a month)

## Food service control systems

and the number of employees you will need. Do not forget to add benefits to this cost.)

Food cost: R30 000 (This is the estimated amount of ingredients you will use in a month. This can be calculated by using all the food costings calculated and estimating how many dishes you will sell.)

Overheads: R16 000 (Overheads are all other costs on top of labour and food cost, for example water and electricity, rent, insurance, cleaning materials, stationery etc.)

Desired profit: R20 000 (This is the profit you get to take home at the end of the day. State a profit that you are comfortable with and which aligns with the risk of owning your own business.)

Add labour costs, food costs, overheads and net profit together to get the sales amount for a month. For example, R40 000 + R30 000 + R16 000 + R20 000 = R106 000 sales.

### Step 2

Determine the percentages of the expenses and profit.

Sales will always be 100%. All other percentages can be calculated by dividing the rand value of the item by the rand value of sales and multiplying by 100.

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Sales	106 000	100%
Labour costs	40 000	37.74% (40 000/106 000 x 100)
Food costs	30 000	28.30% (30 000/106 000 x 100)
Overheads	16 000	15.09% (16 000/106 000 x 100)
Net profit	20 000	18.87% (20 000/106 000 x 100)

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At this point consider whether the net profit percentage is sufficient. Consider what the return on investment you might have received in a different venture, or something as simple as the interest you could earn if you invested the money at the bank, would be.

### Step 3

Lastly, determine the selling price excluding VAT by divide the cost price of the menu item by the food cost %. For example  $R27.45 / 28.3\% = R97.00$  selling price excluding VAT.

A registered VAT vendor should multiply the selling price excluding VAT by 1.14 to get the ultimate selling price including VAT which will appear on your menu. You are not allowed to charge VAT if you are not registered as a VAT vendor.

Your final selling price for the beef stroganoff:  $R97.00 \times 1.14 = R110.58$ .

Some hospitality businesses do not calculate a food cost percentage, but rather decide to use a set percentage in line with industry norms, such as 33%.

Menu cost & update		Food cost			Selling price		
Recipe		Date			Date		
		Portion size			Portions size		
Amount	Ingredients	Quantity	Price	Cost	Quantity	Price	Cost
Total cost							
Portions cost							

### 3.4 Food production planning

Food production planning is done to determine the quality and quantity of menu items that must be prepared. Planning should ensure that resources are not overused or underutilised in food production and service.

Purposes production planning includes the following:

- facilitating food cost control for the business;
- simplifying the purchasing of stock and maintaining proper stock levels;
- reducing leftovers from insufficient planning;
- proper control of leftover food and ingredients;
- provisioning for production and preparation of food by forecasting the number of meals to be served at a certain time;
- comparing actual to theoretical volume of sales and adapting to changing demand.

## Food service control systems

### 3.4.1 Volume forecasting

Forecasts are used to assist hospitality managers and chefs to plan the details of their daily operations and food production. Forecasts look to the future and assist management in the detailed planning of operations for the next week or month.

The major inputs to forecasting are:

- The historical daily averages provided by demand tracking programs can be used to assist with forecasts.
- The established budget of the kitchen.
- Recent events that affect the current operating environment of the business.

The following objectives are important to keep food cost consistent and to maintain profit margins:

- Forecast the total number of meals to be sold.
- Predict menu choices by customers.
- Facilitate the purchasing administration system utilised.
- Ensure the availability and obtainability of all essential stock.
- Maintain proper stock levels.
- Adhere to food cost percentages in relations to sales.

### 3.4.2 Standard yields

Standard yield refers to the eatable or utilisable part of a food item available after preparation. Standard yield is important:

- to establish a quantity standard and determine the obtainable portions from a specific item of food;
- to support menu costing and pricing in establishing a required food cost percentage for the menu item;
- to convert forecast requirements into actual stock needs.

## 3.5 Food administration procedures

The objective of administration procedures is to assist in the implementation of simple but effective systems of administration. These systems not only comply with the requirements of the law, but also provide trading information to the hospitality manager through which actual to budget performance can be

measured. Not all of these controls are necessary; their implementation will depend on the nature and type of the operation.

The following should be kept in mind when the implementation of a food control system is contemplated:

- Any food control system should be comprehensive and cover all the outlets of an establishment and all stages of the food and beverage control cycle.
- The cost of maintaining the system should be in relation to the saving to be made. The level of sophistication of the food control system usually increases with the volume of sales and complexity of the menu.
- The food control system should be easy to operate and be understood by all levels of staff.
- The food control system should be seen by the staff to be working.
- Management must act in a positive and proactive way to adverse trading results and follow up on future results to check if the corrective action taken was effective.
- To be effective the information produced must be accurate and up to date.

Factors which affect a control system include:

- Regular changes in the menu.
- Menus with a large number of dishes.
- Dishes with a large number of ingredients.
- Problems with assessing customer demand.
- Raw materials purchased incorrectly.
- Difficulties in not adhering to or operating standardised recipes.

### 3.5.1 *Stocktaking*

Stocktaking should be done once a week. Stock sheets must list all the stock items in store so that it is a simple procedure to fill in the balance of each stock item. Ensure that cost prices have been updated on the stock sheets and that any new items which have been purchased are listed.

The stocktaking staff should consist of teams of two – one person to do the count and another to record the information. Nobody should take stock alone. Once started, stocktaking should be continuous and interruptions should be avoided at all costs. Therefore it is only practical to take stock outside of peak hours.

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Experience has shown that the simplest method of taking bar stock is to use the 1/10 method. With this method a full bottle value is calculated. For example, 30 tots by R2.50 = R75.00; this represents 10/10. As all bottles of spirits and wine vary in shape, place the bottle on its side as you would a spirit level. This then simplifies the assessment of the remaining balance; according to this approach a bottle with the liquid level halfway would represent 5/10, slightly less 4/10, slightly more 6/10 and so forth.

Stocktaking requires the careful preparation of each section. Stock must be sorted in a neat orderly fashion, and grouped according to price and type, with similar items next to one another. Open items should be placed in front of unopened items. Care should be taken not to disrupt stock rotation. All the new stock should be placed at the back and the old stock in the front. Stocktaking should have a logical starting point and jumping from one stocktaking section to another should be avoided. Specific areas should be assigned to each team and all stocktaking sheets should be consecutively numbered and accounted for at the completion of the stocktake.

Actual stocktaking procedures involve the following:

- Stock should be taken in teams of two – one person to count, the other person to enter the quantities and measurements on the stock sheets.
- Descriptions and quantities should be recorded on the stock sheets.
- Counting should be methodical (left to right, top to bottom) to avoid duplicate counting or uncounted items.
- Items that have been counted should be clearly marked by means of chalk or by any other suitable method you choose.
- The content of all opened containers should also be counted and measured.
- It should be ensured that all stock, including bulk stock, bar stock, kitchen process items etc. are counted.

### *Stock levels*

The level at which a stock item is maintained is often difficult to determine as it can be just as dangerous to overstock that to run out of stock. To determine the appropriate level for reordering of stock items, certain relevant factors must be considered:

- The average consumption of stock items in a specific trading period, determined by consumed stock over a period of up to 6 months.
- The time needed to process a stock order.

- The time between the placing of an order and the receiving of goods.
- A safety buffer for about two days.

### *Stock checks*

Regular spot checks should be made on goods held in stock. That means that a few items should be counted physically and checked against the daily issue sheets. Spot-checking should be planned so that all major items have been checked at least once against the stock issue sheets in the stocktaking cycle.

### *Stock sheets*

Stocktaking should be done once a month (but preferably weekly). Stock sheets must list all the stock items in the store so that it is a simple procedure to fill in the balance of each commodity. It should be ensured that cost prices have been updated on the stock sheets and that any new items which have been purchased are listed.

### *Stock supervision*

Stocktaking should be supervised. The supervisor should ensure that spot-checks are conducted and that counts are not duplicated or stock missed.

### *Price changes*

Stock sheet must be kept updated as this can facilitate special offers. The weighted average price is used when prices fluctuate.

### *Weighted average price*

The weighted average requires some simple calculations as each new delivery is received and prices need to be adjusted.

$$\begin{array}{r} 5 \text{ items on hand at R1.00} = \text{R5.00} \\ + 12 \text{ received at R1.10} = \text{R13.20} \\ \hline 17 \text{ items total} = \text{R18.20} \end{array}$$

$$\text{R18.20} / 17 = \text{R1.07}$$

### *Stock turnover*

Stock turnover is the rotation rate at which stock is used and replenished in a particular cycle. Stock turnover is calculated in the following way:

An example of determining average stock at cost = RST (Rate of stock turnover)

R29 000 of food purchases were consumed in a 28-day trading period.

The opening stock on day 1 was valued at R7 500

## Food service control systems

The closing stock on day 28 was valued at R6 500

$$\begin{aligned}\text{Therefore rate of stock turnover} &= \frac{29\,000}{(7\,500 + 6\,500)} \\ &= \frac{29\,000}{14\,000 \div 2} \\ &= \frac{29\,000}{7\,000} = 4.14\end{aligned}$$

Total value of stock turned over 4.14 times in the 28 day cycle.

It is a general practice for hospitality establishments with a seven day operation to not carry more than ten days' worth of stock and for those with a five day operation not to carry more than seven days' worth of stock. Thus, the stock day levels need to be calculated to ensure optimal stock levels. This can be done by means of the following formula.

Consumption  $\div$  7 trading days

= \_\_\_\_\_

Closing stock  $\div$  \_\_\_\_\_

= \_\_\_\_\_

### ***Stock and consumption sheet***

This document is used to calculate the value of stock on hand at any given time. Organisations can for example state that every outlet takes stock on Thursdays and on or before the last day of the month. It is vitally important that items on the stock and consumptions sheets are categorised and summarised in the same trading sections. It is important that unit prices are updated regularly.

Stock and consumption sheet																
DEPARTMENT	DATE	OPENING STOCK			PURCHASES			TOTAL			CLOSING STOCK			CONSUMPTION		
Items	Units	U/Price	Quant	Value	U/Price	Quant	Value	Quant	Value	U/Price	Quant	Value	U/Price	Quant	Value	

**Stock analysis sheet**

The stock analysis sheet is used to check stock on hand and the value thereof. Stock analysis is done once a week. It is important that items are categorised and summarised in the same trading categories. Unit prices must be updated regularly.

Stock analysis sheet																			
Item	Unit price	Unit	Stock	Open	Issues and purchases								Total purch.	Total issue	Theory CL/stock	Act CL/stock	Unit price	Stock value	Variance
					Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8							
Purchase																			
Purchase																			

## Food service control systems

### *Cut-off procedures*

Any stock delivered prior to the count must be included in the stock take. Invoices relating to deliveries before the count should be clearly marked as “delivered” before the count and included as such. Any stock that has delivered at time of the count should not be included in the stocktake.

### *Importance of maintaining optimal stock levels*

Proper stock control will ensure the uninterrupted flow of stock to the different production or resale points. The following issues need to be avoided:

Problems of low stock levels	Problems of high stock levels
It may be difficult to satisfy guests’ demands	There is an increased risk of a stock item becoming obsolete
It can lead to a loss of business	The risk of stock losses is increased
Insufficient stock levels	The costs of storage is high
Inability to provide efficient service to customers	Stocks can tie up a company’s working capital
Changes in production and service	
Guests feeling inconvenienced	

### *Purchase analysis*

It is important to consolidate all purchasing for a trading period. Most food service units use a document to analyse their purchases into certain trading categories and to act as a summary for capturing data for accounting purposes. Once the supplier’s invoice has been signed it also acts as an authorisation for payment.

Quality control standards in managing the conventional food service system could be ensured by means of the following:

<b>Monitoring quality control systems</b>	<ul style="list-style-type: none"> <li>▪ Every staff member must understand how quality will be managed and measured.</li> <li>▪ Organisational standards in terms of food quality and hygiene.</li> <li>▪ How quality will be managed.</li> <li>▪ When and how often it will be monitored.</li> <li>▪ Who will monitor quality?</li> <li>▪ The consequences of failure to comply with quality standards.</li> </ul>
<b>Receiving</b>	<ul style="list-style-type: none"> <li>▪ Deliveries must adhere to the required standards of quality, hygiene, packaging and temperature.</li> </ul>
<b>Storage</b>	<ul style="list-style-type: none"> <li>▪ Verify stock rotation, storage conditions and the expiry dates of products.</li> <li>▪ Check conditions in the storage areas with reference to signs of dampness, pest infestation and temperature control.</li> </ul>

Preparation	<ul style="list-style-type: none"> <li>Chefs must monitor the quality of the food they are working with. Work practices must be hygienic and comply with the required organisational standards and legislation.</li> </ul>
Storage after preparation	<ul style="list-style-type: none"> <li>The conditions under which prepared foods are stored must be monitored.</li> <li>Products must be stored in the correct containers and in appropriate storage areas.</li> <li>Items are not to be stored for longer than permitted.</li> </ul>
Production	<ul style="list-style-type: none"> <li>Kitchen staff must ensure that they comply with hygienic food production practices. Ensure that staff follows the required production procedures and comply with food production and preparation standards.</li> </ul>
Storage after production	<ul style="list-style-type: none"> <li>The conditions under which cooked foods are stored should be monitored.</li> <li>Ensure that food is properly cooled before storage.</li> <li>Food must be placed in the correct containers and stored in the appropriate storage area. Food storage time must not exceed the recommended storage time.</li> </ul>
Reheating	<ul style="list-style-type: none"> <li>Ensure that food is reheated to the required temperature to destroy bacteria. Food should only be reheated once and discarded after that.</li> </ul>
Presentation	<ul style="list-style-type: none"> <li>Food presentation is important to ensure customers have an enjoyable experience and return again.</li> </ul>
Distribution	<ul style="list-style-type: none"> <li>Food must be served as close to immediately after preparation as possible.</li> </ul>
Stock control	<ul style="list-style-type: none"> <li>Staff must adhere to stock control procedures. This includes ordering and requisitioning processes, prevention of wastage, and the proper and allowed reuse of leftover food.</li> </ul>

### 3.6 Purchasing

In hospitality operations the purchasing of stock and services is the most vulnerable area which could lead to misconduct, because considerable amounts are spent on goods (such as food and beverages, utensils, toiletries etc.) and services (such as cleaning and security services). Besides ensuring that purchases are value for money, it is important for hospitality operators to establish a fair and competitive purchasing system with necessary safeguards to prevent abuse by dishonest staff.

#### *Purchasing objectives*

Each hospitality operations purchasing department should have purchasing objectives. These objectives may include:

- Maintaining sufficient inventory so that products are not out of stock between deliveries.

## Food service control systems

- Reducing investment in inventory by not carrying too much stock, thereby tying up capital in unnecessary stock.
- Maintaining quality standards of products purchased to meet set specifications

### *What is a “dependable” supplier?*

Management should compile an approved list of suppliers for frequently used items. This will help diminish the time necessary for obtaining suppliers for purchases and ensure that only approved companies are requested to supply and deliver.

A reliable supplier is one with whom the hospitality establishment can have a long-term relationship. Important characteristics of suppliers that form the foundation for a long-term relationship include the following:

- Provide up-to-date information regarding price changes, therefore maintaining a competitive price level.
- Understand the market they serve. This entails best meeting their customers' needs, and includes specials, new products and seasonal promotions.
- Capable to constantly deliver the correct quality and quantity of products.
- Advise customers on new or improved products that are relevant to their needs.
- Concern in improving products and services supplied to hospitality establishments.
- The supplier must be professional. It should be easy to follow up on problems, to resolve difficulties that arise and to discuss concerns.

### *Types of suppliers*

The ideal is to have as few suppliers as possible to obtain the required amounts of quantity, quality and price. The first step in the process is to identify the product classifications that are required. This might include:

- Meat
- Fresh fruit and vegetables
- Dairy
- Bakery
- Paper goods
- Cleaning supplies and equipment
- Office supplies

- Crockery, glass and silverware
- Laundry services
- External maintenance

*Importance of decreasing purchasing costs*

Negotiate prices	It's not to say that quoted prices are not negotiable. Negotiate with suppliers to acquire the best possible price for acquiring stock.
Check quality standards	Ensure that the applicable quality is purchased. Don't use products of a higher quality than needed for a specific purpose. In this manner the amount of money spent can be drastically reduced.
Convenience products	Assess the need to buy convenience foods. Train employees to prepare certain basic dishes which will be much more cost effective than buying more expensive convenience items.
Cut unnecessary suppliers	It does not make sense to use a different supplier for different stock items. It is advisable to rather make use of a few dependable suppliers and to build a sustainable relationship with them.
Purchasing bigger amounts	Consider the probable saving made by buying bigger amounts in relation to the amount of stock on hand. The negative side is the increased risk of theft, spoilage and quality reduction.
Cash payments	Pay supplier accounts on time to ensure a good relationship with the supplier, which in turn provides the opportunity for price reductions. Monthly accounts are seen as cash payments.
Change the unit size	Sometimes it is better to buy bigger units of a product. When buying sugar it would be cheaper to buy a single 25kg bag instead of twenty-five 1kg packets.
Combine purchases	Combine purchases with other hospitality establishments. This increases the combined purchasing power of the group, which leads to substantial savings.
Promotional discounts	If promotional discount or seasonal prices become available it's a good opportunity to make use of these specials. The establishment can save a considerable amount.

*Ethics in purchasing*

Managers need to be responsible to maintain high standards of ethics in purchasing. This incorporates all staff, suppliers and their sales representatives. Losses may decrease profits and even lead to the bankruptcy of an organisation. Consider the following aspects to promote ethical standards:

- Be honest in all dealings with suppliers. Personal gifts may not be accepted from suppliers.

## Food service control systems

- Staff should be happy with their jobs, because ethical problems may arise with job dissatisfaction.
- Staff must be familiar with product specifications and check whether suppliers are adhering to quoted prices.
- Check the credentials and competence of suppliers and that they meet their commitments.
- Have proper facilities and equipment for the receiving function.
- Take swift action against any wrongdoers and avoid repetition of the transgression.
- See that all products are stored securely to avoid any theft.

### *Specifications and ordering*

Effective purchasing requires that purchasing specifications be completed for main expenditure items. Clearly, specifications may not be practical or necessary for many items purchased in a food service or hospitality operation, especially everyday items, such as dairy or bakery goods. However, specifications should be used for major food purchases such as meat, fish and poultry. Depending on the circumstances a specification can be quite short and informal and may include only the brand name and quantity of a desired product. In the case of other purchases (equipment, for example) a specification can be several pages long.

Generally the authority to request a needed item is assigned to those responsible for running specific departments. For example, the chef (because he or she is generally responsible for establishing daily menus) usually has the authority to request needed food supplies. The bar manager has the authority to request alcoholic beverages and other supplies to replenish bar stock.

### *Who prepares required stock specifications?*

In a small operation specifications may be prepared by the chef, sometimes in conjunction with the purchasing department. Depending on the circumstances specifications can include any or all of the following items:

- Name or description of the product needed, e.g. container size, grade product or portion size.
- Preferred product quality information, e.g. fruit without signs of spoilage or damaged.
- Intended use of the product, e.g. olives to be used in cocktails.
- Substitute products at a lower cost

**Advantages of specifications**

Involve those who prepare stock specifications to think carefully and document exactly what their product requirements are. Important considerations include the following:

- Serve as a standard for quality.
- Suppliers know precisely the products that they are quoting on which eliminates misunderstandings.
- Not wasting time on repeating standard orders to suppliers every day.
- Less stock purchases as items can be used for more than one menu item.
- Purchasing costs may be reduced by not paying for a higher quality than is required.
- Products can be checked against specifications at delivery.

**3.7 Ordering**

Ordering is an important activity for any hospitality establishment, as it is imperative that the right amounts of goods are available when needed by the various units. It is suggested that an order book should be used to streamline the ordering process. The table indicates an example of an order form.

ORDER FORM			
DEPARTMENT:		DEPARTMENT CODE:	
SUPPLIER:		DATE ORDERED:	
CONTACT:		TIME ORDERED:	
TELEPHONE		DELIVERY DATE:	
QTY	ITEM	UNIT OF MEASURE	UNIT COST

The order form has the following functions:

- A written record of orders placed with approved suppliers.
- Gives authorisation to a department to purchase on account.
- Lessens the chances of mistakes on deliveries from the suppliers.
- Serves as proof of order should there be problems with any deliveries.
- It is a source of reference for relief managers regarding quantities ordered, quality standard and the use of approved suppliers.
- It is an easy reference should queries arise with unprocessed invoices.

Should prices have been quoted especially for specials, these can be crosschecked with the invoice on receipt

### **3.7.1 Purchasing the proper quantities**

Purchasing the appropriate quantity of items is just as important as developing correct quality specifications. Problems that emerge when too many of a product is ordered include:

- Cash flow problems.
- Increased storage cost as current space may not be enough and extra space must be rented.
- It increases the chance of theft.

Food and beverage managers must consider a number of factors that affect the purchasing of correct quantities. These factors include the following:

**Popularity of menu items:** As sales of menu items increase, extra amounts of ingredients are required.

**Product cost concerns:** Higher product prices may affect selling prices, which may cause decreased sales levels. The need for continuous purchase of these products should be evaluated.

**Available storage space:** Storage capacity may limit the quantities bought. Storage space in dry, frozen and refrigerated areas may not be sufficient to contain quantity purchases.

**Safety level:** Keeping a safe level of products in stock may involve buying a quantity exceeding what's actually necessary to allow for delivery intervals.

**Supplier constraints:** Stipulate minimum and/or kilogram requirements for supply. Some suppliers may not break cases, bags or other packaging/containers to meet specific order quantities. Consequently the standard saleable units of packaging effect the amounts purchased.

Suppliers problem report			
Unit name		Date	
Unit number		Supplier	
Unit Tel. No.		Supplier Tel. No.	
Manager name		Supplier contact name	
Date of incident		Time	

Incident refers to invoice # (if applicable)	
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Nature of incident (e.g. late delivery, shortage of stock, quality, packaging, etc.)

Remedial actions

### 3.8 Receiving

The importance of the receiving process is to ensure that the business is acquiring food and beverages of the right quality and quantity purchased at the agreed price. Although the purpose of receiving goods in a catering business or hotel is just as significant as any other function, it is unfortunately the most neglected.

The complete value of stock being received by a business requires a competent, trained person who has thorough knowledge of receiving practices and administration with sound knowledge of all brands of food and beverages. It is crucial for receiving to be situated in such a way that the stock may be unloaded swiftly and distributed to the appropriate storage space.

#### *Requests for credit*

The credit note is a document issued to the supplier when a credit must be passed on the supplier's invoice or delivery note. When a debit must be passed, as in the case where goods are delivered without an invoice, a pro forma invoice must be made out. It is essential that the supplier's representative or delivery person signs the document.

## Food service control systems

Reason for completing a credit note or pro-forma invoice			
Credit Note		Pro forma Invoice	
Over Delivered			
Short Delivered		No Invoice received	
Goods Returned		Unpriced deliveries	
Transfer to		Transfer from	
Incorrect Price			

The following is an example of a credit note/pro-forma invoice:

CREDIT NOTE				
REQUEST FOR CREDIT			PRO FORMA	
SUPPLIER NAME			TEL NR	
DEPARTMENT			DATE	
INVOICE NUMBER				
DESCRIPTION	QTY	UNIT PRICE	TOTAL VALUE	
		SUB TOTAL		
		VAT		
		TOTAL		
Sign Company			Sign Supplier	
		Date		

### 3.8.1 Quality control in the receiving function

#### *Equipment for receiving*

The receiving area should have the following items to ensure proper receiving of stock:

- A table or flat surface for writing and inspection.
- Stationary for writing and marking.
- A precise scale that can weigh accurately.
- A credit note book.
- Trolleys to move stock to designated storage areas.

### *Receiving staff*

There should be enough staff to move stock from the receiving area to the storage rooms as quickly as possible. The receiving clerk should be knowledgeable about the receiving practises, products and specifications used by the business. If special assistance is required it is imperative to inform the manager to accommodate it.

### *Receiving procedures*

The following receiving procedures apply:

- Count each item (the number of cases or individual items) that can be counted.
- Weigh each product that is delivered by weight.
- Verify your count or weight against the delivery invoice.
- Verify invoices with your purchase order.
- Check that the stock received is of the quality required.
- If specifications are used, ensure that the supplier has copies and deliver accordingly.
- Spot-check boxes to ensure that they are full and all items in the boxes are of equal quality.
- If products are delivered without an invoice, write out a pro forma invoice.
- Confirm prices as specified in the buying manual.
- If too little stock is delivered or the quality is not acceptable, write out a credit note indicating the products returned. The delivery agent must sign the credit note acknowledging that the items have been taken back or that they were short.
- Store all products in the appropriate storage facilities as soon as possible.

Send all invoices and credit notes to the accounting office or to the unit manager so that extensions and totals can be checked and recorded.

### *Tips for inspecting deliveries*

The following are some additional tips that the receiver should keep in mind when evaluating food and supply deliveries.

- Inspect foods immediately upon arrival for quality and quantity ordered.
- Anticipate arrival and be ready.
- Check adequacy of storage space.
- Have purchase orders and specifications ready.

## Food service control systems

- Make sure receiving personnel are well trained.
- Check temperatures of refrigerated items upon arrival.
- Check frozen items for evidence of thawing or burn.
- Check perishable items first.

The quality of delivered items must be checked against the written specifications of the receiving function. The following table provides examples of how to check stock according to the different categories.

Perishable food	Non-perishable foods	Non-foodstuffs
Freshness	Condition of the packaging	Condition of the packaging
Condition of the packaging	Quantity	Quantity
Temperature	Specifications	Specifications
Quantity	Price charged agrees with quoted price	Price charged agrees with quoted price
Specifications	Signs of pest infestation	Signs of pest infestation
Price charged agrees with quoted price	Swollen cans – reject them	Condition of goods – no breakages
Signs of pest infestation	Sell-by-dates and use-by-dates	Sell-by-dates and use-by-dates
Sell-by-dates and use-by-dates		
Refills (check that you've received a full tin)		

The following receiving activities can lead to fraud and should be avoided:

<b>Failing to meet specifications</b>	Suppliers sometimes fail to meet specifications in order to increase their own profit or to counteract for having intentionally underbid in order to get the business.
<b>Watering and icing products, increasing the weight or adding excess packaging</b>	Suppliers may use moisture-retaining vegetables (for example, head lettuce) to use excessive packing ice for items (such as poultry).
<b>Invoicing high-quality products for low-quality products delivered</b>	A supplier may charge at a quoted price but deliver products of a lower quality than that called for by the price. Some suppliers, however, have been known to pack a case with correct quality on the top to cover up lower-quality items underneath. Spot-checking the entire case is necessary to control this practise. Alternatively, one or more cases could be opened and inspected from the bottom.
<b>Shipping overweight or over count</b>	A supplier may also deliver more products than were ordered to add to its sales and profits. Accepting more products than were actually desired can lead to excessive inventories and eventual spoilage of goods. Products not ordered should be returned to the supplier accompanied by a supporting credit note.

<b>Putting products directly into storage areas</b>	The basic rule should be that no products are to be put into storage by delivery drivers, either before or after the goods have been inspected by the receiver. If direct storage is allowed, a driver may eventually bypass the inspection and fail to deliver the proper quantity and quality of produce.
<b>Delivering products outside normal receiving hours</b>	A delivery driver who is allowed to deliver outside the hours when the qualified receiver is available may simply obtain the signature of another employee acknowledging that the products have been received, without any count, weight or quality checks. The driver may simply leave the goods without having anybody check them at all. In both these cases dishonesty is encouraged.

### 3.9 Storing

Hospitality operations store raw or cooked ingredients in storage areas before production or service. Since the food items stored can represent a great deal of money, it is imperative to see that all items purchased are properly stored and are issued in a definite sequence. Loss or waste of food and non-food items may occur due to improper storage, theft, insect infestation and non-accessibility. Products piled without any logical arrangement may be subject to loss in addition to posing a safety hazard.

It is advisable to set limits on the number of persons who have access to storage. In other words, the fewer people that go in and out of the storage areas, the more secure and efficient the foodservice operation will be. Storage areas should have easy access from the receiving area and from the preparation and production areas. Storage areas should be clean and neatly arranged and should have the capacity to store all goods ordered – conversely, quantities ordered should be based on the amount of storage space available. Various guidelines and sanitary requirements must be complied with. The temperatures and humidity in storage areas have to be controlled and should be kept at the optimum level so that losses are prevented

#### *Procedures to avoid stock shrinkage and waste*

<b>Locked doors</b>	Stores should be kept locked. In larger stores double doors should be used where the lower door remains locked as it is too easy for staff to enter and leave unnoticed by the storekeeper.
<b>Two sets of keys</b>	Only the storekeeper and duty manager should have store keys.
<b>No unauthorised entry</b>	Unauthorised staff should not be allowed to enter the stores, including sales representatives, drivers and kitchen staff.
<b>Set issue times</b>	Restrict the issuing of stock to specific hours – between 8am and 11am for food and beverages and between 2pm and 4pm for food should be adequate. The manager/chef on duty should only issue extra stock after hours. Ideally, stock should be issued from the main store into smaller day stores in the kitchen, but in smaller restaurants there is not always enough space.

## Food service control systems

<b>Compulsory requisitions</b>	No food or beverage should be allowed to be taken out of the stores without a signed requisition.
<b>Good housekeeping</b>	All storage areas, including the cold room, freezer and dry goods store, should be repacked and cleaned daily.
<b>Identify slow movers</b>	Slow moving items should be brought to the attention of the executive chef so that the stock can be used up as quickly as possible.
<b>Record waste</b>	Record bottle breakages, spillage, rotten food and flat drinks in a waste book.
<b>Retain bottles</b>	Return all bottles, broken and otherwise, and crates to the appropriate sales representative for credit.
<b>Follow the FIFO system</b>	First in, first out. Put new items at the back and move older items forward to be used first. Check expiry dates as stock already in hand may have a longer expiry date than the latest arrivals. In an ideal situation, all food and beverage items entering and leaving the stores should be accounted for.

### *Reducing kitchen related theft*

Kitchen staff has access to valuable food and beverage products. The following security tips are helpful when designing control systems to limit theft:

- Keep all storage areas locked and secure.
- Issue food only with proper authorisation and management approval.
- Monitor the use of all carryovers.
- Do not allow food to be prepared unless a guest check is pre-rung with the appropriate order.
- Maintain an active inventory management system.
- Ensure that all food received is signed for by the appropriate receiving clerk.
- Do not pay suppliers for food products without an appropriate and signed invoice.
- Do not use petty cash to pay for food items unless a receipt and the product can be produced.
- Conduct periodic physical inventories of all products.
- Do not allow employees to remove food from the premises without management's specific approval.

### *General storage conditions*

Cleanliness in storage areas and throughout the storage process is important to ensure that your storerooms function optimally and that valuable stock isn't lost to ignorance and negligence.

- Storage areas should be well ventilated, have adequate lighting and be secure.
- Shelves and pallets must be provided in all areas. No food items may be stored on the floor.

- All storage areas must be cleaned regularly to maintain a high level of hygiene.
- All food should be covered and adequately protected from contamination. All excess outer packaging must be discarded.
- Storage areas must be checked daily and temperatures recorded.
- Non-food products (cleaning and disinfecting agents, insecticides, other poisonous substances, etc.) must never be stored with food.
- Store different products separately from each other so as to prevent cross-contamination.
- All shelves and storage areas must be clearly labelled.

#### *Dry goods storage conditions*

- The floor must be kept clean and free of spills.
- The shelves must be clean.
- Practice the FIFO (first in first out) principle in stock rotation.
- The shelving must be away from the wall to allow for cleaning.
- It must be dry and free from damp.
- Chemicals and non-food products must be stored separately.
- Storage must have metal or plasticised shelving.

#### *Freezer storage conditions*

- Thermometers must be accurate.
- The temperature must be between  $-1^{\circ}\text{C}$  and  $-4^{\circ}\text{C}$ .
- Door seals, hinges and handles must be clean.
- Light covers must be clean and rust-free.
- Fans, grids and shelves must be clean.
- Nothing must be stored on the floor, and metal or plasticised shelves must be 20 to 30 cm above the floor to allow for cleaning.
- Practice the FIFO principle in stock rotation.
- Do not overload storage.
- Store raw foods separate from cooked foods.

#### *Control unhygienic conditions*

- The storage area should be clear of rubbish, debris and be thoroughly washed, cleaned and dried.
- When mopping, make sure that signage is visible to warn of slippery floors.

## Food service control systems

- Use applicable chemicals to clean storerooms.
- Ensure there are no insect or pests before taking in new stock.
- Make sure the packaging of the goods is in good condition.
- Items that need to be refrigerated or frozen should be at the right temperature. Fridges remain at a constant -4°Celsius.
- Ensure standards maintained are in compliance with occupational health and safety legislation.

### *Consider the following for deteriorated stock*

- Was it stored under the correct conditions?
  - If not, take action to ensure that this is not repeated.
- Make sure that all involved parties are aware of possible storage problems.
- Is there something wrong with the climate control (temperature, ventilation, dryness) in the storage area?
  - If so, report this to maintenance immediately so that action can be taken.
- Were too many of items ordered, meaning that they could not be used quickly enough?
  - If so, give feedback to the person responsible for the original purchase order.
- Are certain items simply not moving or being used?
  - If so, give feedback to the person responsible for the original purchase order.

### 3.10 Issuing

Issuing involves distributing food and beverage items from the storerooms to permitted staff members who requisition the products.

#### *Daily issue/requisition sheet*

The daily issue sheet is used to control issues from the stores. This form is to be filled out every time stock is issued from the stores. This sheet can be used as an aid for all costing (including menus).

Why do we prepare a daily issue and costing sheet?

- To calculate the cost of all items issued from the store rooms.
- To assist with stores stock control by commodity.
- To do daily meal costings.
- To ensure correct quantities are issued for meal preparation

DAILY ISSUE AND COSTING			
DATE:			
MEAL:			
ITEM	QUANT.	U/PRICE	TOTAL
TOTAL COST EXCL. VAT			
14% VAT			
TOTAL COST INCL. VAT			
INCOME PER MEAL			
PROFIT / LOSS			

### Pre-preparation

Pre-preparation refers to the process of measuring, trimming, grinding, shaping, chopping and all other processes involved to get food ready for production. The French refer to *mise en place*, which means “put in place”. This culinary term refers to the purchasing, preparing and measuring all the ingredients necessary for a dish before you start cooking.

*Mise en place* makes the actual process of cooking more efficient and helps prevent the chef from making mistakes or discovering missing ingredients at a crucial moment. This simply means that before you can start cooking your recipe, you want to make sure you have all the ingredients and equipment needed.

### Assembly

Assembly is the combination of prepared menu items to complete a meal unit. Assembly can occur at a number of points along the sequence of process steps depending on the type of food service organisation and the production system used.

### Cooking

The purpose of cooking food is to improve and increase the flavour and attractiveness of the colour, form and texture and to destroy harmful organisms and materials. It also needs to improve digestibility and to preserve the nutritive value of prepared food. Cooking is accomplished by the transference of heat from an energy source to and through food.

### Portioning

Portioning is actually an early step in recipe standardisation. It is the decision on the size of portions to be served. The standardisation of portions is important to

## Food service control systems

control cost, but also to ensure customer satisfaction and eliminate complaints. Guests get upset if one serving is smaller than another. Food should be portioned by weight, measure or count.

### *Hot and cold handling*

To prevent foodborne illness one should ensure that all dishes are held under the proper temperature.

#### *For hot foods held for service*

- Verify that the air/water temperature of any unit is at 60°C or above before use.
- Reheat foods in accordance with regulations. All reheated foods should be reheated so that all parts of the food reach a temperature of at least 74°C for 15 seconds.
- Take the internal temperature of food before placing it on a steam table or in a hot holding unit, and at least every two hours thereafter.

#### *For cold foods held for service*

- Verify that the air/water temperature of any unit is at 5°C or below before use.
- Chill foods, in accordance with standard operating procedure.
- Take the internal temperature of the food before placing it onto any salad bar, display cooler or cold serving line, and at least every two hours thereafter.

### 3.11 Food service

Food service can be defined as the phase of the food flow process wholly concerned with presentation of the food to the customer, after the completion of food production. In some situations food service may include an element of transportation due to the separation of the food service preparation and the serving point.

The critical point at which customers' tempers fray in food service is at the service counter or table. If the food and beverage service method is to be successful there must be a clear understanding of the problems that occur at the food service point. The basic requirements that should be met by any food and beverage service method are:

- The system chosen must be in keeping with the total concept of the food service outlet.
- The serving method must represent value for money to the customer.

- Food and beverages should be displayed attractively.
- To provide facilities for preserving the temperature, appearance and nutritional quality of the food and beverage products.
- Good quality control should be enforced.
- Fast and efficient service should be provided.
- Atmosphere of hospitality and attractiveness should be created.
- Organisation and cleanliness should be continuously emphasised.

These are the basic requirements that should be met by any food and beverage service operation regardless of the simplicity or elaborateness of the serving method. In order to move the food produced to the customer some form of food service is required. This may vary from full silver service in a luxury restaurant or hotel where the food is brought to the customer's table to a self-service cafeteria where customers collect their own food from a service counter.

Traditionally full waiter service is the predominant method of food service. In contemporary times a greater degree of informality when eating away from home has been introduced. Alternative food service methods and styles have thus been developed. The mode of food service employed by an establishment will depend on a number of interrelated factors, including:

- the type of establishment;
- the type of associated food production method;
- the type of customer to be catered for;
- the type of menu to be offered;
- the space available;
- the availability of staff and their skills;
- the cost and profit targets of the establishment.

#### *Ware washing*

To prevent cross contamination, tableware and kitchenware should be washed rinsed and sanitised after each use.

#### *Clearing after service*

After completion of service it is important that the dining area and service equipment are cleaned and prepared for the next service period. Hygienically it is not advisable to leave dining areas and service equipment unclean after service as this could encourage the growth of bacteria and attract vermin.

However, it also makes sense to thoroughly clean up a service area as it will make it easier and less time consuming for the staff members who set up for the next session.

### **4. Summary**

This theme focused on the importance of properly managing food service systems in hospitality establishments. It detailed the various components necessary to maintain smooth operations by using the integrated food service system as guideline.



# Beverage management

*Fezeka Judith Mavuso*

## 1. Introduction

The bar service is an integral part of the food and beverage service and is focused on serving alcoholic and non-alcoholic beverages to guests. The provision of bar services is vital to the overall dining experience of hospitality establishments. Staff working as part of the bar service should be professional, passionate, enthusiastic and have product knowledge.

In bigger establishments the bar area is usually separate from the dining area, where in smaller establishments it tends to be incorporated into the dining area. It is imperative that staff in large and small establishments is well trained to perform all beverage services. A sommelier usually performs this duty in larger establishments.

While large establishments may have more formalised procedures in dealing with the bar service it is imperative that smaller establishments also adhere to the provision of an inclusive service. All hospitality establishments must have a beverage list which should be divided into wine, cocktails, spirits, aperitifs, liqueurs, beer and ciders, juices and soft drink sections. Establishments are required to have a liquor licence to sell any alcoholic beverages.

## 2. The bar service

For the sake of this section the bar service includes preparing and serving all beverages – specifically garnish preparation, knowledge of the various spirits, liqueurs, aperitifs, sparkling wines and champagne, wines, digestives, and beer. It will also allude to the types of bartenders and the qualities of a professional bartender.

*The following types of bartenders can be distinguished:*

- **Bar back:** Responsible for restocking the bar during the course of service.
- **Service bartender:** Responsible preparing the drinks for floor staff. All waiters will request their beverages and come back to fetch the orders.
- **Sommelier:** Responsible for the serving of all alcoholic drinks during the service of meals. This person is knowledgeable about wine and he works very closely with the chef in pairing food and beverages when compiling the menu.
- **Bar manager:** Responsible for the operation of the bar, to oversee that everything runs smoothly.
- **Cocktail bartender:** Responsible for service of all beverages, must be well versed in the skills of flaring and mixing drinks.

#### *Qualities of a professional bartender*

Bartenders are an important part of any hospitality establishment and they need the following qualities:

- must be a good salesperson;
- a confident and mature individual;
- an entertainer;
- a decision maker;
- someone willing to take responsibility;
- someone who is committed to provide the highest quality service;
- a dispenser of alcoholic & non-alcoholic drinks;
- a person who loves what they do and has an enormous amount of job satisfaction.

#### *Personal hygiene of bartenders*

The overall image of a bartender is crucial and a distinct impression must be made on customers. The bartender is entrusted with handling guests' needs and must therefore reflect cleanliness and professionalism at all times.

Bartenders are responsible for keeping their uniform neat and clean at all times. Scented lotion should not be worn as it clings to glassware.

### 2.1 Workstation and bar setup

The design of the bar will determine the ease of service. The bar can be divided into three areas: the service area, the workstation and the display area. The streamlining of these areas will help bartenders with speed and efficiency when preparing drinks.

The **service area** is the section of the bar between the guest and the bartender. Some customers prefer to sit in this area to interact with the bartender and be entertained during drinks preparation. Jugs of water must be placed at the end or edge of the counter for customers.

The **workstation** is the area where the bartender prepares the drinks. Each establishment will have a different setup, but the basic equipment and utensils will be the same. When you use a moveable bar, divide it into three main areas: ice dump, jockey box, and speed rail and glass rack.

- The ice dump contains large quantities of ice cubes and crushed ice.
- The jockey box contains juices in colour coded bottles and fruit containers.
- The speed rail contains all house spirits for ease access.

The display area is in full view of the customers; it is the area where all premium products are displayed. It is important to only display items that are for sale. The display area can be divided into aperitifs, spirits, and local and imported liqueur cordials. This will help the barman to work efficiently – when the customer requests a certain product it is easy to recommend and find the product.

#### *Preparing and clearing areas for table drink service*

It is essential that service areas are well set-up and organised prior to service. The term for preparing service areas and equipment is *mise en place*. This is an important stage for the smooth and successful operation of any establishment.

Tasks to be completed before the start of service:

- sanitise surfaces;
- ensure that there are sufficient service items and equipment, including napkins, table cloths and overlays, glassware, menus and wine lists, cutlery and service plates and docket books;
- that condiments are prepared;
- checking all supplies in the service station;
- cleaning and arranging dining furniture;

- laying tables ready for service;
- setting up food and beverage displays;
- checking that all *mise en place* duties are done before the arrival of guests.



Some of the tasks that may need to be performed after service could include:

- checking supplies of service stock and reporting shortages to the supervisor;
- cleaning and storage of service items and equipment;
- disposing of rubbish and leftovers;
- cleaning of dining and service areas and equipment;
- turning off all electrical equipment such as coffee machines and stereo systems.







Condiments items are placed on the bar workstation and offered to guests to enhance or complement their drinks. Condiments may include any of the following: salt and pepper, Tabasco sauce, Worcester sauce, sugar and milk.


#### ***Bartender tools and equipment***

The following bartender tools and equipment can be distinguished:

 <p>Hawthorn Strainer</p>	<p>Cocktail strainer</p> <p>A strainer is used with a Boston shaker to strain mixed drinks. It helps a lot when straining into several glasses. The standard shaker has a built-in strainer.</p>
 <p>Boston shaker</p>	<p>When mixing ingredients use the glass to add all the ingredients for the customer to see what is added.</p>

## Beverage management

 <p>Standard shaker</p>	<p>Three piece set to mix all the ingredients.</p>
 <p>Wooden muddler</p>	<p>Cocktail muddler A wooden stick used for muddling ingredients. It is often used to crush cherries and mint leaves.</p>
 <p>Citrus zester / stripper</p>	<p>A special tool that cuts strips of citrus rinds.</p>
 <p>Bottle opener</p>	<p>Every bartender should have a bottle opener. It's one of the main tools at the bar.</p>
 <p>Bar spoon</p>	<p>This is a spoon with a long handle used to stir mixed drinks in tall glasses. You can also use the back of the spoon for layering drinks.</p>
 <p>Speed pourers</p>	<p>Speed pourers are very useful for free pouring. There are many different types of speed pourers and they all pour different amounts of liquor.</p>

 <p>Corkscrew / wine opener</p>	<p>This is a wine opener. There are many different types of corkscrews. The one on the picture is a waiter's corkscrew. Learn how to open a wine bottle.</p>
 <p>Ice bucket and ice tongs</p>	<p>The ice bucket is a container that holds ice. The ice tongs is a tool to pick up ice cubes for your drinks.</p>
  <p>Jigger</p>	<p>Tot measures</p>
 <p>Glass trimmer</p>	<p>To rim or decorate the glass.</p>
 <p>Chopping board and knife</p>	<p>To make garnishes.</p>
 <p>Juice bottles</p>	<p>Colour coded juice bottles to assist the barman to work effectively without looking for a specific juice.</p>

## Beverage management

 <p>Bar caddy</p>	<p>Used to display straws, coasters, serviettes, umbrellas and so forth.</p>
 <p>Bar fridge</p>	<p>To keep mixers and beers.</p>
 <p>Garnish tray</p>	

### *Point-of-sale systems*

It is important for any establishment to have a point-of-sale (POS) system. Different POS systems can be used depending on the needs of the particular hospitality establishment. The most popular POS systems include GAAP, Odyssey and MICROS. These systems are multifunctional and can organise back of house and front of house. Smaller establishments that cannot afford these kinds of POS systems can use an Excel spreadsheet that will have all the information necessary based on the establishment's needs.

Currently there are POS systems available than run on smart phones, for example Lavu (iPad) and Pozool (Android). Pozool gives you options on how to perform certain transactions. You can download it from [www.pozool.com](http://www.pozool.com).

### *Benefits of POS*

- It improves customer service.
- Enhance staff teamwork.
- Increases profits.


**General rules to consider when purchasing POS**

- Purchase a POS that will be suitable for your establishment.
- Look at the needs of your establishment.
- Choose options that will benefit the whole establishment.






**2.2 Garnish preparation**

It is vital to buy fresh produce and make sure there are no blemishes. A garnish should be vivid in colour and fresh in appearance, with no visible signs of age or deterioration. Always wash produce in cold water before cutting it, using a clean cutting board and knife.

A garnish is an essential part of many drinks recipes. A good garnish increases the overall appeal of a drink and uses the aroma of fruit, botanicals, spices and other ingredients to enhance the sensory experience. Using too much garnish should be avoided.

Garnishes for cocktails	
	<p>Lime wedges: Cut the ends off the fruit and cut lengthways then cut into equal sections. Limes produce approximately six to eight wedges.</p>
	<p>Olives: Suitable for Martinis. Place one olive inside the glass or make an olive kebab.</p>

## Beverage management

	<p>Oranges: Spiral the fruit making use of a canelle knife to cut a long length of peel. Start at the top of the fruit and make a small incision with the tooth of the knife, then drag the tooth under the skin of the fruit. Use your thumb and forefinger to hold the fruit firmly and twist your other hand. Ensure that the fruit is fresh and firm.</p>
	<p>Strawberry dipped in chocolate: Melt chocolate and dip the strawberry. Make a slit to place it on the side of a glass</p>
	<p>Mint sprigs: Mostly used in the preparation of mojitos, placed on top of crushed ice. Wedges with mint sprig: Cut a hole in the skin of a lime or lemon wedge and insert the stem of a mint sprig. This garnish is mostly used for crushed ice drinks.</p>
	<p>Citrus: A twist is a 1-2mm thick strip of citrus skin used to spray oils onto the surface of a drink. It is used when making a cosmopolitan. You flambé the citrus skin and sprinkle the oils onto the surface of the drink. When done sprinkling the oils, rub the rim of the glass with the citrus skin to give the drink a burnt orange flavour.</p>
	<p>Maraschino cherries: Drop it inside the glass or place it on top of the drink. Make a slit and put it on the side of the glass</p>

### 2.3 Serving alcohol

Alcohol may not be served to people under the age of 18. If suspected that a particular guest is underage they could be required to produce their identity document. It is suggested that triple tots should not be served to guests as this can cause them to get intoxicated more quickly. If guests order a triple tot it should be served in two glasses, one glass with double and one with single tots. Bartenders should note the signs of intoxication. The following are common signs of intoxication:

- slurring and mispronunciation;
- staggering, swaying or clumsiness;
- looking sleepy, eyes rolling back;
- significant change in behaviour;
- speaking loudly and the inability to hear properly.

Arrangements should be made to take an intoxicated guest home.

Bartenders should have extensive product knowledge, including aspects like alcohol content, the unit of measurement and country of origin. This should assist the customer in the choice of drinks to order. The alcohol percentage of any beverage is written on the label of the bottle.

A good bartender is not someone that only sells alcohol but provides an experience. It is imperative that guest's service delivery expectations should continuously be met. The following aspects should be kept in mind:

- Guests should always feel welcome. They should be greeted with a smile and friendliness.
- Acknowledge the presence of the guest by placing a coaster in front of them. In a small establishment you offer guests a beverage list.
- Guests should be informed of special offers and specific recommendations can be made before the order is placed.
- Drinks should be prepared in front of guests – especially in the case of cocktails.
- The correct glassware and garnishes should be used when preparing drinks.
- It should be ascertained if guests are satisfied with the service they received.
- Guests should also be thanked for choosing the establishment.

## 2.4 Types of alcoholic beverages

It is of utmost importance that bartenders know all the products that they are selling and which the most popular brands are. Each establishment should have a pouring brand (which is a cheaper brand) and a premium brand (which is a more expensive brand). This section covers the fundamentals of product knowledge and the different types of spirits you can find.

Different types of alcohol:

- Distilled products: spirits
- Fermented products: beer, wine, cider and fruit beverages
- Fortified products: sherry, port and vermouth
- Liqueurs
- Aperitifs
- Digestives

### 2.4.1 Spirits

A spirit is a beverage that has been produced by the process of distillation. There are thousands of spirits available on the market, each with a unique taste and aroma. The fermentation process, distillation and filtration, the amount of time a spirit is left to mature and the storage thereof contributes to the personal character of a finished product.

- **Vodka:** Vodka is a clear spirit that can be produced from any product that contains starch or any source of fermentable sugar, mainly rye, barley, wheat, corn and potato. Water plays a vital role in the final product.
  - Well-known brands include Smirnoff, SKYY and Absolut Vodka.
  - *Essential serve:* Vodka can be served neat, on the rocks or with a mixer. It can also be used for cocktails.
- **Gin:** Gin is a clear unaged vodka-like grain spirit. Juniper berries is the main ingredient, while other botanicals can be added in the production of gin.
  - Well-known brands include Gordon's, Beefeater and Bombay Sapphire.
  - *Essential serve:* Gin and tonic and gin and orange juice are favourites. It can also be used for cocktails.
- **Brandy:** Brandy is referred to as a fruit distillate and is made by distilling fermented fruit juice. The majority of world brandies are made by using

fermented grape juice (in other words wine), the most famous being the French brandies of Cognac and Armagnac.

- Cognac is a fine French brandy from the region around the town of Cognac in western France. Grape varieties used are Ugni Blanc, Folle Blanche and Colombard. These grapes are harvested, crushed and the juice extracted for fermentation which produces wine. It must be matured in French oak casks.
  - Armagnac is a brandy specially produced in Armagnac in the Gascony region, located south of Bordeaux. The major differences between Armagnac and cognac are the area (Armagnac), the aging (only 1 to 5 years), the barrels (darker woods) and the grapes (principally St Emillon).
  - Symbols and stars on labels:

3 star	1 year local consumption (Three year UK and America)
VSOP	4 years
XO	5 years
  - Well-known brands include Richelieu (brandy), Hennessy and Rémy Martin (cognacs) and Baron de Sigognac (Armagnac).
  - *Essential serve*: Neat, on the rocks, with water or a mixer.
- **Whisky**: Whisky is an aged grain spirit and is made differently in countries around the world. Whiskies have different styles which can be categorised as single malt Scotch whisky, Irish whisky, American whisky, Canadian whisky and Japanese whisky.
    - Well-known brands include Bell's, Jameson and Johnnie Walker.
    - *Essential serve*: Neat, on the rocks, with water or a mixer.
- **Rum**: Rum is a plant distillate made from fermented sugar cane juice or molasses. It can be aged, unaged, flavoured and dark. Rum has different styles which can be categorised as white rum, gold rum, aged rum and dark rum.
    - Well-known brands include Bacardi, Captain Morgan and Havana Club.
    - *Essential serve*: Rum with coconut water, and rum with cola or ginger ale.

- **Cane:** Cane is a clear, odourless vodka-like spirit distilled from fermented molasses.
  - Well-known brands include Mainstay.
  - *Essential serve:* On the rocks, with a mixer or fruit juice.

### 2.4.2 Liqueurs

Liqueurs are defined as sweetened and flavoured spirits. They should not be confused with liqueur spirits which are whiskies or brandies of great age and quality. For instance a brandy liqueur is a liqueur with brandy as a basic ingredient, whilst a liqueur brandy may be defined as a brandy of great age and excellence.

- Liqueurs are made by two basic methods:
- Heat or infusion method – Heat extracts the oils, flavours and aromas from the herbs, peels and/or roots which are being used.
- Cold or maceration method – Flavours and aromas are provided by soft fruits.
  - Well-known brands include Amarula, Cape Velvet, Tia Maria, Drambuie.
  - *Essential serve:* Liqueurs are generally offered from a liqueur trolley at the table. Serve on the rocks or neat.

### 2.4.3 Aperitifs

An aperitif is a drink served prior to a meal in order to stimulate one's appetite. Any drink may be taken before a meal, but not any drink will whet the appetite.

There are two categories of aperitifs:

- Wine-based aperitifs: Fortified wines and herbal wines which include vermouth.
- Spirit-based aperitifs: Neutral spirits flavoured with extracts from fruit, plants, roots, herbs and/or spices.
  - Well-known brands include Campari, Pimm's and Pernod.
  - *Essential serve:* Served with orange juice, lemonade or on the rocks.

### 2.4.4 Sparkling wines and champagne

*We cannot call our local sparkling wines, "champagne". Only sparkling wines made from the France region of Champagne can be called Champagne. However, this does not mean that our sparkling wines are lower in quality compared to the ones produced in France.*

Sparkling wine and champagne are made from the pinot noir, pinot meunier and chardonnay cultivars. These wines get their fine bubbles through a second fermentation process, which takes place in the bottle. During this process extra yeast and sugar are added where after the bottles are sealed, laid on their sides and turned daily. In this way all the dead yeast cells settle in the neck of the bottle. This creates great pressure and to prevent the bottles from breaking they are placed upside down in wooden racks so that the solids collect on the corks in the necks of the bottles. Once all the impurities have settled in the necks of the bottles and the wine is clear, the bottles are immersed in a bath of chilled brine with the result that the impurities above the cork freeze. The crown seal is removed and due to the pressure of the carbon dioxide which built up in the bottle the frozen yeast or sediment plug is pressed out. The bottles are then topped up with a mixture of wine and cane sugar. The final product is sealed with a special type of cork, which consist of three layers and then strengthened with a wire capsule.

The French way of making champagne *Méthode champenois*  
 In South Africa known as *Méthode cap classique*

### Classification of sparkling wines

<i>Brut:</i>	Extra dry
<i>Sec:</i>	Dry
<i>Demi-sec:</i>	Semi-sweet
<i>Doux:</i>	Sweet

### Bottle sizes

Magnum:	2 Standard bottles (1.5 l)
Jerobeam:	4 Standard bottles (3 l)
Rehabeam:	6 Standard bottles (4.5 l)
Metusalag:	8 Standard bottles (6 l)
Salamanasar:	12 Standard bottles (9 l)
Baltasar:	16 Standard bottles (12 l)
Nebukadnesar:	20 Standard bottles (15 l)

## Beverage management

### *Opening a bottle of champagne*

Before opening a bottle of champagne, make sure it is correctly chilled at around 8-9°C. The warmer it is, the higher the pressure. Place the unopened bottle in an ice bucket at least 30 minutes before serving.

When serving, dry the bottle with a cloth. Starting below the wire cage, peel off the foil. Hold your left thumb on the bottle cap and with your right hand, turn the wire ring clockwise about six turns. Loosen the wire cage but do not let it go off the cap. Don't lean over the bottle or point it at anyone or anything breakable. Your thumb won't prevent the cork from escaping, but it will alert you to any movement and permit evasive action.

Remove the wire cage. With the base of the bottle in your right hand, hold the cork firmly in your left. Turn the bottle anti-clockwise until the cork begins to twist free. We are looking for a hissing sound rather than pop. Letting the cork fly out is a serious error because it dissipates a lot of the bubbles the winemaker has worked so hard to put there in the first place.

Pour slowly so that the drink does not overflow. Also make sure the glass is squeaky clean, otherwise there'll be no froth (mousse) at all. Only fill the glass about halfway. If you angle the glass, it reduces the exuberance of the mousse.

### *2.4.5 Wine*

The following procedure should be followed when serving wine:

- Show the bottle to the host from the right hand side.
- Open the bottle on the side station.
- Put the cork and capsule in the pocket of your waist coat.
- Put the tasting glass on the saucer in front of the host, pour a little wine into the glass and allow the host to taste.
- Ladies are served first, clockwise around the table. The host is served last.

Handling glassware is an essential part of wine service. It is very important that you know how to handle glassware. Glassware must always be clean and sparkling.

### *Handling glassware*

- Never use a chipped glass to serve a customer.
- Never use the glass to scoop ice. It can break in your ice.

- If you break glass in your ice, throw away all the ice and make sure that there are no pieces of broken glass.
- If a glass is hot, do not put ice in it. The glass can break with the change of temperature.
- If the glass is cold, do not pour anything hot in it.
- Do not stack the glasses too high.
- Do not stack two different types glasses together. They can get stuck together and if you try to separate them, they might break.
- Don't carry more glasses than you can handle in your hands. Use a tray to carry them.
- Always handle the glass by the stem or base.

### *Cleaning glassware*

Hand washing:

- Use the correct detergent.
- Use a soft cloth.
- Hand wash glasses one at a time.
- Do not knock the glasses together.
- When finished place upside down on a cloth to drip.
- Polish it immediately using a clean cloth over hot water.

Machine washing:

- Carefully place the prepared racks in the machine one at a time.
- Wash them following the manufacturer's instructions.
- When washing is finished take racks out of machine and place on a flat surface.

Polishing glasses:

- Dry glasses as soon as possible after washing.
- Get a bowl or container of near-boiling water.
- Allow the steam to enter the bowl of the glass.
- Polish the glass using a clean, dry cloth while rotating it.

## Beverage management

Carrying glasses on a tray:

- Looks professional.
- Avoids breakage.
- Makes sure there are no fingerprints on the glasses.

Carrying glasses by hand:

- Carry glasses by the stem or foot.
- Never carry too many at the same time.
- Avoid knocking them against other things.
- Be extra careful when glasses are full so you do not spill.
- Ashtrays can be heavy and can hurt you if they are dropped.

The following types of glasses can be distinguished:



Martini glass



Margarita glass



Hurricane glass



Brandy balloon glass



Old fashioned glass



Collins glass



Red wine glass



White wine glass



Rocks glass



Sherry glass

#### 2.4.6 Beer

Beer is made from a fermented combination of malted barley, hops, yeast and water. The liquid is strained and transferred to tanks allowing it to mellow. The protein in the malted barley gives beer its white head. It is then carbonated and packed accordingly. There are different styles of beer like lager, ale, pilsner and stout. The fermentation process gives beer its unique taste.

#### Serving beer

- Make sure the glass is clean. A clean glass not only enhances the appearance of the beer but ensures guest satisfaction.
- Beer should be served at a temperature of between 12.5 and 15.5°Celsius. If beer is too cold it lacks intensity and the characteristic bitter taste.
- Always ask the guest if you may pour their beer.
- Hold the glass at a 45 degree angle and pour slowly, straightening when the glass is three-quarters full. This is likely to produce a head of approximately 20mm, which is satisfactory to most beer drinkers.

### 3. Some cocktail recipes

A cocktail is a stimulating drink that is composed of different types of liquor. Different methods can be used to make a refreshing cocktail. Bartenders must be creative when preparing and presenting cocktails. Most cocktails consist of the following:

## Beverage management

- **Base:** The main ingredient; usually any spirit can be used.
- **Modifier:** These ingredients, in combination with the base, characterise the cocktail and modify all the flavours in a drink. Sugar syrups and fruits can be used as modifiers.
- **Mixer:** This is usually a soft drink or juice which tops up the drink.

### *Cocktail recipes*

#### **Bloody Mary**

1 ½ tot vodka

1 ½ tot Bloody Mary mix

1 tot tomato cocktail

#### *Method*

Add the vodka, tomato juice and condiments to a mix glass and fill with ice. Cap with Boston shaker and shake gently, then pour back into the glass. This drink should have a thick soup-like consistency, so shake the ingredients gently so as not to dilute the mix. Garnish with celery, lime or lemon wedge. Serve with a long straw.

#### **Mojito**

2-4 lime wedges

½ - 1 tot sugar syrup

8-16 large mint leaves

Crushed ice

2 tots light or aged rum

Soda water

Mint sprigs

#### *Method*

Add the lime and sugar syrup into a Collins glass and muddle. Add the mint leaves and place the flat end of the bar spoon in the glass. Fill the glass with crushed ice and pour in the rum. Rapidly raise and lower the spoon to thoroughly mix the drink, then top with soda. Garnish with a sprig of mint, rubbing the leaves before serving to release the bouquet.

### **Margarita**

1 ¼ tot tequila  
¾ tot Cointreau/triple sec  
1 tot lime juice  
½ sugar syrup  
Ice cubes

#### *Method*

Add all ingredients into a mixing glass and fill with ice. Cap the shaker

### **Long Island iced tea**

½ tot vodka  
½ tot white rum  
½ tot triple sec  
¼ tot gin  
¼ tot tequila  
1 tot lemon or lime juice  
½ tot sugar syrup  
Ice cubes  
Cola

#### *Method*

Add the vodka, rum, triple sec, gin, tequila, lemon or lime juice and sugar syrup into a mixing glass and fill with ice. Cap with Boston shaker and shake for a few seconds. Strain into an ice filled glass and top with cola. Garnish with a lime or lemon wedge. Serve with a long straw.

**NB: This drink should look like tea, not a long glass with Cola.**

### **Classic Daiquiri**

2 tots aged rum  
½ tot lime juice  
1 bar spoon sugar syrup  
Ice cubes

#### *Method*

Add all the ingredients into a mixing glass and fill with ice. Cap with Boston shaker and shake vigorously until the shaker freezes on the outside. Strain into an ice filled glass or fine strain into a chilled martini glass. Garnish with lime wedge. To serve on the rocks, strain over ice in a rocks glass.

#### **4. Summary**

Beverages may be served on their own or with food, complementing the food and enhancing the guests' enjoyment of both. As a great deal of knowledge, skill and experience is required of staff serving beverages this theme provided the basic principles related to the beverage service.



# Health, safety and hygiene

*Yvonne Maluleke-Makubalo*

## 1. Introduction

Hospitality establishments, as the name indicates, are responsible for rendering a hospitable service to customers, which in most cases include the provision of food and beverages. It is therefore imperative that anyone responsible for food operations, like chefs, waiters and other food and beverage staff, be adequately informed about the importance of health, safety and hygiene when working and preparing food and beverages in hospitality establishments.

Legislation like the Occupational Health and Safety Act (85 of 1993), Machinery and Occupational Safety Act (6 of 1983) and National Building Regulations and Building Standards Act (103 of 1977) has focused on the preventative measures and good practices necessary to guarantee safety in the hospitality industry. Changing consumer demands have also helped the drive towards improved food hygiene. Guests are also generally speaking better informed about their rights, which mean they expect certain standards of health, safety and hygiene. The seasonal nature of employment in the hospitality industry, and the high level of labour turnover, adds to the challenges of continuous training. It is imperative that managers and supervisors are first of all adequately trained to share their knowledge with staff.

Managers should at all times comply with set organisational standard and continuously engage in the training of their staff. This theme aims to provide simple health, safety and hygiene guidelines for hospitality establishments. Apart from the legislation mentioned other regulations also apply to health, safety and hygiene, including SABS regulations 1475 and 0139.

## 2. Health

A comprehensive and integrated approach to health issues in a hospitality establishment is essential, as it can affect its image and sustainability. Under

the concept of 'health' a broad range of issues can be addresses, including physical and psychosocial issues, environment, health practices, personal resources, and policies and practices. Health issues in the workplace are governed by the Occupational Health and Safety Act (85 of 1993). There is a strong connection between the health and well-being of people and their work environments. When people feel valued, respected and satisfied in their jobs and work in a safe, healthy environment, they are more likely to be more productive and committed to their work. When the workplace is unsafe, stressful or unhealthy both the business and the employees are affected. Health issues affecting the hospitality industry include food spoilage, food wastage, food borne illnesses and food poisoning.

### 3. Safety

It is important to adhere to safety in the workplace as serious workplace injury or death has the potential to impact families and organisations. In addition to major financial burdens, they can impose substantial time demands on uninjured family members and organisations alike. A safety measure increasingly used is the so called Hazard Analysis and Critical Control Points (HACCP) approach. HACCP (as part of Occupational Health and Safety Act) require establishments to have a food safety control or management system available within a food service unit. Many HACCP plans focus almost exclusively on microbiological control. For example, the United States Department of Agriculture's mandatory HACCP program focuses on pathogen reduction in meat and poultry products.

The United States Food and Drug Administration's long-standing low acid canned food regulations, considered by many to be the first mandatory HACCP program, focuses exclusively on the control of the *clostridium botulinum* bacterium. Similarly, the seafood program is focused on microbial control. Apart from this, other safety hazards include:

- Broken glass
- Chopping board chips
- Pieces of chipped crockery
- Artificial nails
- Machinery parts
- Wooden particles
- Jewellery

## Health, safety and hygiene

Control of physical contaminants begins with the identification of raw materials or components that can be hazardous to customers. An effective control program should include support from vendors and suppliers. The severity of the potential threat will determine the appropriate control strategy. A vision system or X-ray inspection may be acceptable for the control of glass contamination, while a properly regulated metal detector may be effective against both ferrous and non-ferrous metals contaminants. Human assistance will be required for the inspection, detection and removal of dangerous pits and stems in food preparation. Proper training of food handlers can prevent product contamination.

The misuse or incorrect handling of cleaning chemicals and other materials can contaminate food. In order to prevent chemical hazards from occurring, food should be covered and stored in an area separate from cleaning chemicals. Sprays should never be used in areas where food is exposed. Below are examples of chemical hazards that might be found in a food service unit.

- Packaging materials
- Vitamins (A, D, E, K)
- Dairy products
- Artificial aromas
- Cleaning and sanitising agents
- Eggs
- Artificial sweeteners
- Glues
- Colour extracts
- Greases and oils

Microbiological hazards occur when micro-organisms get into food and poison or spoil it. They reduce the shelf life of products and can also seriously affect the health of the consumer. The most common micro-organism that causes food poisoning is bacteria. Bacteria are tiny living cells that can only be seen under a microscope. Some bacteria, such as *acidophilus* which is found in yoghurt, are beneficial to people. Many other forms of bacteria are dangerous and can cause illness and disease.

### 3.1 Common accidents in food service units

Common food service incidents include the following:

- Slips – slippery floors.
- Cuts – using knife and other sharp kitchen utensils.
- Burns – hot water or oil.
- Shocks – holding electrical equipment with wet hands.
- Injuries – incorrect lifting of equipment and stock.

In order to minimise incidents in a food service unit, any unplanned occurrence that can harm employees or guests should be minimised. Accidents are mostly caused due to poor design of food service units, hazardous jobs, unprofessional installations of equipment, staff being exposed to dangerous tasks, lack of staff training and incorrect storage. Equipment that is not serviced on a regular basis or according to the company maintenance schedule can also be unsafe. It is imperative that the following safety measures should be in place to prevent these incidents:

- Spillages should be cleaned immediately and a cautionary sign must be displayed.
- Employees should be trained on how to safely work with knives.
- Employees should at all times wear their personal protective equipment and the workplace should always have, and continuously replenished, their first aid kit.
- Employees should always be aware of electrical cords and similar obstacles.
- There should be enough lighting in the store rooms, and heavy items should be packed at the bottom of the shelves, with light objects on top.
- Objects should not be left on the floor as individuals can trip and fall.

The following guidelines apply to handling of electrical equipment:

- Make sure machines are switched off before it is unplugged.
- Wiring should be in good condition.
- Use the safeguard that is provided for the machine.
- Hands should not be put into machines while they are operational.
- Machines should be turned off and unplugged before disassembly and cleaning.
- The lid of a food processor should not be opened while the machine is running.

- Care should be taken with blades when cleaning a machine.
- Machines that are out of order needs to be clearly marked.

The following safety guidelines apply to using gas:

- Gas can be dangerous and areas should be well ventilated.
- The match or torch should be lit before the gas supply is turned on.
- Always make sure gas cylinders are installed outside of the kitchen.
- Always make sure that gas cylinders are tightly closed after use.

### 3.2 Emergency evacuation

Emergency evacuation is the immediate and urgent movement of people away from a threat or actual incident like fire, a bomb threat, floods etc. Emergency evacuation is necessary to reduce possible injury, loss of life and property damage, as well as to minimise insurance claims.

Every food service unit should have an evacuation action plan on site. An emergency action plan is a written document which helps the employer and employee in case of unplanned incidents. According to the Occupational Health and Safety Act environmental regulation in a workplace requires cinemas, licensed premises and other high-risk public buildings to have emergency plans. The evacuation plan should be displayed on all notice boards and employees should be trained regarding evacuation procedures.

## 4. Hygiene

Hygiene and good habits are a good prevention against infection. Hygiene ensures the preservation of health and healthy living. Hygiene can involve both personal (in a domestic environment) and business (occupational hygiene and public health) hygiene. It also relates to healthy food, cleanliness, and mental health. Good personal hygiene is imperative for protection against illness and infections. Personal hygiene generally involves washing your hands, but also the body. Hygiene also means being careful not to cough or sneeze on others, cleaning things that you touch when ill, putting items such as tissues (that may carry germs) into a bin, and using protective aids like gloves when there is a risk of catching an infection.

This section will focus on the importance of ISO 22000. ISO 22000 is an international standard which addresses food safety management. The consequences of unsafe food can be serious and the ISO 22000 food safety management standards help organisations identify and control food safety

hazards. As many food products repeatedly cross national boundaries, international standards are needed to ensure the safety of the global food supply chain.

Establishing and maintaining control is central to all management functions – control is achieved by getting the commitment of employees to clear hygiene and safety objectives. It begins with a manager taking full responsibility for control factors that could lead to ill health or injury. Senior managers should coordinate and monitor the implementation of all health, safety and hygiene issues.

The following aspects are crucial in ensuring proper hygiene in a hospitality establishment: personal hygiene when handling food, medical examination of employees, hygiene in the various service units (such as the bar, housekeeping, laundry, restaurant, kitchen, public restrooms and reception), operational hygiene for storage areas, pest control and compiling cleaning schedules.

#### 4.1 Personal hygiene when handling food

Most bacteria live on the body. It is therefore very crucial to practice good personal hygiene in the kitchen. It helps to prevent the spread of illnesses and disease. It also helps people to feel good about their appearance.

Guidelines for maintaining personal hygiene

- Food handlers should bath or shower at least once a day and use soap and hot water to kill bacteria on their hands and body.
- Hands and nails should be scrubbed with a brush before starting a shift.
- The hair of food handlers should be covered at all times. Touching hair while busy with food should be avoided.
- Brushing teeth every day it is also crucial for good personal hygiene.
- Personal protective equipment should be used by food handlers. A uniform should be worn in the kitchen and it is the employer's responsibility to supply the employee with uniform.

The following rules should be adhered to by food handlers:

- No smoking on duty should be allowed.
- Talking in the kitchen during the execution of tasks should be minimal.
- An employee that is sick should rather stay at home to prevent the spread of germs. Regular check-ups for fitness can be promoted once or twice a year depending on the company policy.

- No eating should be allowed in the kitchen. Lunch breaks should be used for eating.
- Jewellery is not allowed in the kitchen.

### 4.2 Medical examination of employees

When an employee is permanently employed it is the employer's responsibility to make sure that regular medical tests, like fitness for duty, are conducted. If the employer does not provide medical examinations, it is the personal responsibility of the food handlers to look after their own health and general wellbeing.

### 4.3 Hygiene for food service units

*Kitchen:* The construction, condition and design of food service units should allow adequate space for activities conducted in the kitchen. Lightning should be adequate so that staff can clean properly and prevent injuries.

*Water supply:* Water is necessary for cleaning food service facilities, as well as for cooking. Water should be acceptable for human consumption. Hot and cold water supply should be available at a volume, pressure and temperature adequate for the purpose that the water is used for.

*Handling of food and other stock:* Maintaining food facilities are important and food preparation handling and storage areas should be kept clean and well ventilated at all times. Food safety is of utmost important in public health issues. Governments all over the world are intensifying their efforts to improve food safety. The contamination of foods during transportation should be prevented by ensuring that food packaging and containers are properly sealed.

*Facilities for employees:* Restrooms and changing room facilities should be provided for employees. It should be clean at all times and sufficient lightning and ventilation, basins, soap dispensers, toilet paper, lockers and sanitary bins for ladies should be supplied. Staff should have a warm shower before and after changing shift to minimise the spread of germs in the food service unit.

*Working methods and procedures in food preparation and service:* Hot and cold food should be kept at their respective temperatures. Chipped crockery should never be used and food should be covered at all times to prevent contamination. Disposable items should never be reused and safe temperatures should always the adhered to.

*Cleaning and housekeeping:* Housekeeping entails the cleaning of rooms and furnishing. It includes removing rubbish, cleaning floors and walls, dusting and vacuuming etc.

Any food service facility should implement a cleaning schedule for employees to follow on a daily basis. Housekeeping employees should also be provided with a uniform and they should familiarise themselves with cleaning chemicals before using them. According to law the supplier of the chemicals should supply a material safety data sheet that should specify the types of cleaning chemicals in stock, as well as the guidelines for first aid in case of the chemical get in contact with skin or eyes.

Chemicals should not be mixed and should not damage the surfaces on which it is used. Manufacturers labels should always be checked. Chemicals should be stored in a separate storeroom and employees should be trained and informed about the use and hazards of various chemicals. Empty containers should be disposed of or recycled if possible. Rubber gloves should be used by cleaners and only supervisors should have access to the chemical storeroom.

*Work surfaces:* All surfaces for food handlers should be hygienic. Materials used to construct work surfaces should be non-porous, be chemical and scratch resistant and easy to clean.

*Floors:* Floors should be very strong and handle any objects that are being moved around the facility. Tiles are the best for floor coverage because they are easy to clean. Floors should not have cracks because pest can breed in the gaps, causing the facilities to be unhygienic.

*Shelves, walls, ceilings and windows:* Shelves should preferably be made of stainless steel, because they are sturdy enough to handle the weight of heavy stock items. Walls should be tiled so it's easy to clean. Light colour tiles should be used. Windows should have gauze or mesh to keep flies and unwanted insects out. Windows should allow for enough ventilation.

*Kitchen equipment:* Catering equipment in food service units is usually very expensive and it is important for employee to take good care of all appliances.

*Dishwashing:* The dishwashing machine should use hot water and should preferably be an industrial machine. Employees cannot wash by hand, especially for an establishment that is busy. A sink with two compartments should be provided for manual washing and rinsing equipment and utensils.

*Waste and refuse removal:* Waste should have a removal schedule. It must not pile up, as this can cause pests and bad odours around the premises. There should be a designated area for waste, which should be separated according to category (food, plastic, paper and cardboard, tin etc.) for recycling purposes.

#### 4.4 Operational hygiene for food service areas

*Bar:* The bar counter should always be clean, tidy and professional. The bar equipment should at all times be polished and no dirty or chipped equipment must be used. The following guidelines should be adhered to:

- Always rinse/wash bar utensils like cocktail shakers and strainers after using them, even in-between the service.
- Wash and dry hands as often as possible, especially after contact with citrus fruit and juices.
- Bar tenders should not smoke or drink while serving guests, as this could be considered unsanitary (and illegal in many countries).
- A champagne cork should not pop on removal as it is considered to be in bad taste and dangerous to guests.
- Handle a glass of soda siphon by the plastic or metal part only. The heat of one's hand may cause the glass to shatter.
- Never fill a glass to the brim.
- It is advisable to use round rubber trays, which offers better grip than other types of trays.

*Cleaning:* Housekeepers should regularly change linen in the rooms, wash the floors, dust surfaces and clean the bathrooms. To ensure high levels of hygiene, the housekeeping department has to change all soaps, shampoos, lotions and towels on a daily basis. Housekeepers should also use safe antiseptics to sterilise floors and surfaces. Before a new guest checks into a room, a supervisor has to check that housekeeping has fulfilled all cleaning procedures.

*Gifts and tipping rules:* To curb theft most hotels enforce rules on receiving gifts and presents from guests. Housekeepers should ask the guest to write a note explaining that they have given a gift. They should also surrender anything found in a room to their supervisors with a slip indicating the room number the item was found. Housekeepers must also respect a guest's personal items by not touching or moving any items that look expensive or fragile. In addition, while most accommodation establishments allow and encourage appreciation by guests through tipping, housekeepers should not solicit tips or negotiate the amount with a guest.

*Laundry hygiene:* Linen and towels are very important stock items in any hospitality establishment. Linen keepers should be responsible for maintaining enough clean and quality linen to support the overall operation of the establishment. Quality linen is very expensive and enough stock should be kept

at all times. Poor checking procedures will impact on the quality of linen that is used, and may result in guest complaints. Linen must be inspected for stains and tears and any linen that does not meet standards should be disposed of according to the establishment procedures. Damaged linen can often be cut and reused as cleaning or dusting cloths.

When linen keepers receive the linen the following guidelines can be use:

- Check that the receiving area is clean, neat and tidy before linen is delivered.
- Check all deliveries against the invoice.
- The inventory list should have the number, types and sizes of items.
- Check items for quality control purposes. Ensure there are no marks, stains, fading, tears, frayed edges or loose seams.
- Record any variances or discrepancies according to establishment procedures.
- Make sure that a copy of the delivery note/invoice is kept for processing and record purposes.

*Restaurant hygiene:* One of the worst nightmares guests can experience is food poisoning after dining at a restaurant. It is of utmost importance that hygiene and cleanliness in your hospitality establishment be of the highest standard. To show your guests clear that your facility is clean and tidy, a certificate of medical and sanitary inspection, or certificate of compliance for the current year, should be displayed.

*Kitchen hygiene:* Kitchen hygiene refers to the standards that should be observed and maintained in the kitchen. Some of them include ensuring that the kitchen is clean and the utensils are neatly arranged. Stoves should be cleaned on a daily basis. In the kitchen the slogan of “clean as you go” should be enforced. The following aspects apply:

- Sanitise working surface before working with food.
- Any spillages should be wiped up as soon as possible to prevent slipping.
- The kitchen should be supplied with all necessary cleaning chemicals like dishwashing liquid and rinsing chemicals at all times. Paper towels should always be supplied.
- The correct utensils/equipment should be used properly to prevent unnecessary injuries.
- Staff should receive instruction on how to use kitchen appliances and equipment.
- It is advisable that store rooms, fridges, freezers and walk-in freezers be cleaned on a weekly basis.

- Bins should be supplied in the kitchen for waste.
- Dirty/old oil should be recycled by the establishment and a certificate as proof that can be issued as part of adherence to HACCP.
- The supervisor should conduct kitchen inspections at least once a month.

*Public restrooms hygiene:* Public restrooms should be clean at all times.

*Reception hygiene:* The front office receptionist is normally the first face visitors see and they are responsible for the first impression people have of an establishment. Proper training on hygiene for this role is essential, as well as clearly outlining what is expected of the employee throughout their workday. No eating in the reception area should be allowed, as this may look unprofessionally to guests.

For more information on the food safety regulations and guidelines refer to <http://www.doa.agric.za/>

### 4.5 Operational hygiene measures in storage areas

The storeroom should be close to the operational unit to prevent fatigue. The FIFO (first in first out) rule should apply to prevent loss of stock. Shelves should be labelled so that food handlers can easily detect goods. The required temperature of storage should be 20-25°Celsius. Adequate lighting is very important in the stores and they should also be well ventilated. Cool storage areas should be kept at 4-6°Celsius. Refrigerators should be between 1-4°Celsius.

*Storing:* Canned products are easily maintained and have a long shelf life. Expiry dates should still be checked. Canned food should be stored in dry storage. When receiving stock, dented tins should not be accepted. Canned foods should not be placed near heat, as they can expand, or in a cool store, as they can freeze.

Frozen perishables should be handled the following way:

- Fruits and vegetables should be kept in the original packaging in the fridge or walk in fridge. Allow unripe fruit to be stored at room temperature. Bananas should not be stored too cold as they tend to go black or brown.
- Refrigerating meat slows the growth of bacteria, but does not stop it as freezing does. Meat should be vacuum packaged to avoid freezer burn. Each package should be labelled and dated with a permanent maker. Raw

and cooked meat should be store separate. Fresh meat can keep between four and five days. Apply FIFO system should apply.

- Fresh fish should be stored in its original wrapper. Fish on ice can can be kept fresh until cooking time. If not cooked within one to two days, it should be wrapped in moisture-proof freezer paper or foil and stored in the freezer.
- Poultry should be well cooked to kill bacteria and poultry should be stored at a cool temperature.
- Eggs should be bought from a high turnover supplier before the expiry date. A fresh egg has small air cells, whereas old eggs not. Keep original packages when storing eggs. The way you store eggs it will affect the quality of eggs.
- Milk should be stored in its original package. Do not expose milk to direct light and store in the refrigerator. Milk can be frozen up to three weeks. Long life milk can last for months if unopened.

*Leftover food:* Reheating leftover food should be avoided. If food are reheated it should reached at least 75°Celsius throughout – meaning it should be piping hot. Food should not be reheated more than once.

#### 4.6 Pest control

Pests can include birds, rodents, insects and arachnids (spiders). Pests may carry germs around the food service unit. Adequate fumigation is thus essential and it should be done at least every three months. Pests can cause physical damage to foods products and packaging or equipment and electrical cables.

#### 4.7 Compiling a cleaning schedule

To make sure that all areas in the food service facilities are being attended to cleaning schedules should be implemented. The cleaning schedule should be a written document displayed on the notice board for every employee to see. What should be cleaned, as well the frequency and responsibility of who should do the cleaning should be clearly specified, as well as the chemicals and protected equipment to be used. The supervisor or manager should monitor the cleaning schedule.

### 5. Summary

This chapter highlighted the importance of health, safety and hygiene in hospitality establishments. It is imperative that senior management ensures that policies are in place and that operational managers implement the policies in the appropriate way.

## References

Occupational Health and Safety Act 85 of 1993. Pretoria: Government Printer.

National Buildings Regulations and Building Standards Act 103 of 1977. Pretoria: Government Printer.

Machinery and Occupational Safety Act 6 of 1983. Pretoria: Government Printer.



# Culture, religion and food rituals

*Zorada Hattingh*

## 1. Introduction

Food is a life-sustaining commodity that forms a dominant part of the spiritual practises of religions around the world, including Christianity, Islam, Hinduism, Judaism and Buddhism. South Africa, being known for its diverse population, is no exception in this regard. Within the hospitality industry, familiarity with the complex religious and cultural rituals and food observances of these groups is vitally important. This theme focuses on the food practices of the major religious and cultural groups in South Africa.

## 2. Christianity

Christianity is the dominant religion followed by more people around the world (including South Africa), than any other religion. Approximately 80% of South Africans belong to the Christian faith, which includes Roman Catholicism and Protestantism. These faiths are not strict in terms of dietary requirements, but they do have some food consumption rules. Roman Catholics will not eat meat on Ash Wednesday, which is the beginning of Lent, a 40 day period prior to Easter Sunday, It is also customary not to eat meat on a Friday during Lent; this includes Good Friday. Instead, they will have fish and dairy products on those days. Most Protestants celebrate Christmas and Easter whereby family and friends are often gathered to enjoy a traditional cooked meal and typically on Good Friday hot-cross buns.

## 3. Judaism

The Jewish religion is estimated to be 4 000 years old and began when Abraham received God's earliest covenant with the Jews. The pillar of this religion is the Hebrew Bible, in particular the first five books, known as the Torah. The Torah describes the Jewish food laws and the correct way of preparing food. The term "kosher" means "fit" and therefore refers to permitted food items. All Orthodox

and some Liberal Jews follow the dietary laws (relating to food and beverages) known as Kashrut, as determined in the Torah and explained in the Talmud.

*Meat of animals included or excluded from the diet:*

- Only meat from clean (*kosher*) animals are permitted. The meat and milk of all mammals with a completely cloven hoof and which chews cud may be consumed. To qualify as pure, any land mammal should therefore have both these qualities. These animals are considered clean and include cattle, goats, deer, oxen and sheep. Pork, rabbits and carnivorous animals are not considered clean and are therefore prohibited. Clean birds with a crop, gizzard and extra claw may be eaten. These include chickens, ducks, geese and turkeys and their eggs. Birds of prey and their eggs are not allowed. Only fish with fins and scales may be eaten. Catfish, eels and sharks, and shellfish such as lobsters, oysters, shrimp, prawns, clams and crabs, are not considered clean and therefore not allowed. Sturgeon is not allowed and therefore also not the caviar produced by this fish. Gelatine and fat from impure animals or animals not slaughtered according to Jewish prescriptions, and insects, rodents, reptiles, amphibians and invertebrates may not be eaten. Honey from bees is considered kosher and therefore not forbidden.

*The process of slaughtering animals and inspecting the carcass:*

- The meat of permitted mammals and birds is allowed only if it is killed by the process called *shehitah*, which is in accordance with Jewish law. The *shochet*, a well-trained and licensed Jewish butcher, has to kill the animal with a quick, deep stroke across the throat with a sharp blade, causing most of the blood to be drained from the carcass and thereby rendering it *kosher*. This instant and painless method of slaughtering is considered the most humane method of killing an animal. Any blemishes or disease detected when examining the meat will declare it unfit.

*Prohibited parts of allowed animals:*

- Traditionally only the forequarters, containing less blood, of a permitted animal may be eaten. The blood of no animal may be eaten, including an egg yolk with a bloodspot. Any solid layer of fat such as fat surrounding the organs and the liver may not be eaten.

*Meat preparation:*

- There are some restrictions placed on the preparation of meat. All blood must be drained from meat before it may be eaten. Liver can only be koshered by the broiling method to get rid of the abundance of blood and blood vessels.

### *Principles for meat and dairy:*

- The concurrent consumption of meat and dairy is not allowed – a person furthermore has to wait for three to six hours after eating meat before dairy products may be consumed, but one hour after dairy products have been consumed meat may be eaten. Yiddish words such as *fleishik* (meat), *milchik* (dairy) and *pareve* (neutral) are used to describe food or utensils classified in one of these categories. There are no restraints regarding the eating of fish, eggs, fruit, vegetables and grains at the same time and they may be consumed together with meat or dairy.

The utensils, cookware, plates and flatware, cleaning implements and cloths used for meat and dairy are also separated. Separate preparation and storage areas for meat, dairy, and cutlery and crockery are used. The storage area for cutlery, crockery and glassware is locked separately from any other hotel ware.

### *Fruit and vegetables:*

- All fruit and vegetables are considered *kosher*, but should be inspected for worm or insect infestation. Grains are also subjected to inspection for any infestations. Although grapes are *kosher*, wine made by non-Jews is proscribed. This also includes grape juice which is often used in fruit juice or fruit flavoured drinks. Baking powder made with cream of tartar, which is a byproduct of the wine-making process, is not considered *kosher*.

### *Holy days and feast days:*

The Jewish Sabbath lasts from sunset on a Friday until sunset on a Saturday. No work may be done on the Sabbath and all meals should be prepared on the Friday.

Rosh Hashanah indicates the beginning of the Jewish New Year, usually in September or October (according to the Jewish calendar), and a period of ten days of remorse that ends with the day of atonement known as Yom Kippur. This day, the holiest of the year, is a fast day when no food, water or medication may be consumed from dusk until dusk. This applies to everyone except for boys under thirteen years, girls younger than twelve years, the very ill and women during childbirth.

Hanukkah, or the Festival of the Lights, is normally celebrated during December for a period of eight days, when one extra candle in the candelabra is lit each night until all eight candles are lit. This period pays tribute to the recapturing

of the Temple in Jerusalem when potato pancakes or latkes and food cooked in oil such as doughnuts are traditionally eaten.

During the Passover or Pesach in March/April, the exodus of the Jews from Egypt is commemorated. During these eight days of festival, no leavened food or food being in contact with leavened foods may be eaten. The food eaten during the Passover, such as the bitter herbs, depict the story of this exodus from Egypt and is a reminder of the Israelites' distress under Egyptian mastery. Chicken soup, matzo balls and meat or chicken form part of the menu.

#### 4. Islam

Muslims are supporters of the Islam faith, the second largest religion in the world. The prophet Mohammed, who initiated this religion, was born in Mecca, Saudi Arabia. The spiritual writings of Islam and their basic laws are contained in the Koran. Muslims believe in moderation, not only in their way of life, but also in their eating and dietary habits. They consider eating as a form of worship; they eat for survival and health and should therefore not overindulge in food.

Foods that are acceptable are called *halal* and only the Muslim God Allah may determine what may be eaten or not. The flesh of animals that chew cud are permitted. Poultry and fish may be eaten, but no shellfish. Milk, cheese, yoghurt and butter are allowed. Unless known to be poisonous, all vegetables and fruit are *halal*. Vegetables may be pickled in brine or vinegar. All grains, cereals and breads are *halal*. On the contrary, the concept *haram* is used to refer to foods that are harmful and therefore prohibited. Four-footed animals that hunt their prey with their mouths, birds of prey that catch their prey with their claws, and the byproducts of these animals may not be eaten. Pork and products containing pork such as ham, bacon, salami and gelatine are forbidden mainly for health-related reasons.

For meat to be *halal* the animal has to be slaughtered according to special rules in the name of Allah and in a way similar to the method used by the Jews. No blood or blood products, alcohol or vanilla are allowed. The drinking of caffeinated drinks such as coffee and tea, as well as smoking, is discouraged. The ninth month of the Muslim calendar, called Ramadan, is characterised by fasting and a time of restriction for the whole body when Muslims do not consume food or beverages from sunrise until sunset. This implies that they will eat early, before the sun rises and only again after sunset when the fast is broken and any food or beverages except alcohol may be consumed. As a rule

children before puberty may fast for short periods, such as one day a week or for a few hours, after which they will share in this ritual with their parents and other adults. The special celebrations at the end of Ramadan are referred to as Eid-ul-Fitr, and are characterised by special foods eaten during this time.

### 5. Black South Africans

There are several indigenous ethnic groups in South Africa, each having its own food preferences. Culture, taste and tradition play a major role in the food choices of this group of South Africans. The last few decades depict clear evidence of major shifts in the dietary patterns of black South Africans. A more westernised diet is now at the order of the day, particularly among blacks residing in urban areas where the diet is much more diverse than the rural diet. These trends in food consumption patterns are also strongly observed during celebrations and special occasions such as birthdays, Christmas, New Year's Day, weddings and funerals. The changes from the traditional to modern diet can be ascribed to migration, urbanisation, education and economic development, amongst others. The foods served at traditional celebrations are still characterised by traditional dishes accompanied by more Western foods. In truth, it is common practice to serve mainly Western foods with the addition of certain traditional staple foods at modern celebrations. Urbanised black South Africans are normally more flexible regarding their food tastes than rural blacks. The caterer should therefore consider the culture, traditions, tastes and menu for an occasion and consult with the organisers.

When preparing food for special occasions, preference is given to slaughtering cattle and sheep on the premises instead of purchasing meat from a butcher. Cooking of meat normally takes place during the morning of an event. In general, meat is prepared on the stove with seasoning and spices added. Not all Black South Africans eat pork. Chicken can be served together with beef or mutton, or as an alternative. Fish is becoming more apparent among some Black people. Rice and samp are served with meat. A braai may be preferred to celebrate a birthday. Potatoes, cabbage, carrots, butternut or pumpkin and spinach are firm favourites from the vegetable group. Salads such as a basic lettuce and tomato salad and carrot salad are also very popular. Desserts are not traditionally served at special occasions. Otherwise, ice cream, baked pudding and trifle (mainly jelly and custard) are favourites. Portions are usually bigger for males than females.

## 6. Hinduism

The earliest Hindu scripture, the Rig Veda, is estimated to be at least 10 000 years old. Numerous scriptures have been written over the various time periods. Hindus, by virtue of their scriptures, ought to be vegetarian. Eating meat was forbidden and frowned upon. If a person consumed meat, that person was considered lowly in status and people kept away from them. By virtue of the fact that the cow is considered as “mother”, because many women who could not breastfeed their babies and raised them on cow’s milk, and because of the asset this animal was in terms of providing sustenance through its milk products, toiling the fields etc., the killing and eating of a cow was strictly forbidden. You cannot kill something that you rely on and need to sustain your family and yourself. Furthermore and most importantly, ghee (clarified butter), which is an integral part of many Hindu rituals, is obtained from cow’s milk. If all cows were killed, there would be no ghee and hence these ceremonies would not be possible. Pork was also strictly forbidden due to its scavenger status and because it was utilised to clean up the filth of the surroundings. It was also generally considered unclean and unhygienic.

When the 1860 Indian settlers came to South Africa, many Hindus who were vegetarian adapted to the South African meat eating society. Some Hindus consume lamb, chicken and white fish on some non-vegetarian days. However, there are still many orthodox Hindus who are vegetarian and do not eat beef or beef products as the cow is considered as sacred. Some refrain from meat on certain big prayer days in the week. Therefore many Hindus will not eat any meats on Monday, Tuesday Thursday and Friday. Dairy products such as milk, yoghurt, cheese, butter and ghee are considered pure and are therefore allowed. However, strict Hindus do not eat eggs and some Hindu women may not eat eggs, which are considered as a potential source of life. Pork is sometimes restricted, and pork and pork products are not eaten by strict Hindus. Many Hindus do not use garlic or onion when preparing food. Alcohol consumption is avoided or restricted.

Having adopted a South African lifestyle, many Hindus enjoy the usual breakfast items such as toast, cereals, eggs, etc. Lunch is often a packed lunch or sandwiches, pies etc., and supper some curry and rice or roti. Supper is usually the main meal, and rice is a staple. Hindus tend to use a variety of spices. Meals on fasting days will consist of various lentils, potatoes and pasta dishes. Special days like Diwali and other festivals are completely vegetarian with bryani and curries featuring on the menu.

## 7. Vegetarianism

People practice vegetarianism because of various reasons. Some consider it unethical to kill an animal for food, while others do so for religious or health reasons, to preserve the ecology, to combat world hunger, for economic reasons, because of the influence of the family or a friend, or because they have an aversion to the taste of meat. People working in the food service industry have to be aware of the increasing demand for high quality and flavoursome vegetarian food that meets the dietary needs of various vegetarian groups and should be prepared to provide them with alternative food items.

Vegetarianism refers to practicing a diet that excludes meat and other animal products from the diet, but includes grains, pulses, nuts, seeds, vegetables and fruit with or without the addition of dairy products and eggs. There are, however, several vegetarian styles and variations. Veganism is the strictest form of vegetarianism and vegans or “true vegetarians” do not include any meat, poultry, game, fish, shellfish, dairy products, eggs or honey in the diet. They only consume plant foods, i.e. fruit, vegetables, legumes, nuts and grains. The diet of lacto-vegetarians includes dairy products, while ovo-vegetarians include eggs, but not chicken. Lacto-ovo vegetarians are the least strict group of vegetarians with most vegetarians falling into this category. The latter group excludes meat, poultry and fish, but includes dairy products and eggs. This form of vegetarianism is also popular amongst those belonging to the Seventh Day Adventist religion. The diet of fruitarians consists primarily of fruit, nuts, honey and vegetable oils. Pollo-vegetarians eat only chicken and plant-based items, while Pesco-vegetarians eat only fish and plant-based items. Semi-vegetarians are those who only exclude certain types of red meat, fish or poultry. Some individuals will for example avoid all red meat, but still include poultry and fish in their diet.

## 8. Summary

In view of the aforementioned dietary guidelines for different cultural and religious groups it is evident that hospitality managers must take these factors into consideration for the effective management of their food and beverage department. South Africa as the rainbow nation incorporates all these groups and therefore the importance of this cannot be over-emphasised.



# Protocol and etiquette

*Jeanine Nothnagel*

## 1. Introduction

The rules relating to protocol and etiquette differ from one country to the next. The protocol and etiquette practises in South Africa are based upon those of the Western culture, which originated in Western Europe. Most countries in the European Union, the English-speaking Commonwealth countries, the USA and the Nordic countries have adopted these sets of protocol and etiquette rules. Muslim countries and countries from the Far East have different sets of protocol and etiquette rules. Africa has rich traditions and cultures, which manifest our particular brand of etiquette. Aspects like colourful and traditional dress and fine cuisine are some of the examples. The sincerity with which one approaches every protocol and etiquette matter overrides any so-called breach in protocol and etiquette.

Protocol and etiquette is an important consideration, especially for the hospitality industry which deals with national and international visitors. The following question is often asked: "What is the right protocol for this or that?" Not knowing the answer can cause you to inadvertently offend a guest and possibly damage the relationship between your business and guests. The aim of this theme is to provide protocol and etiquette guidelines for hospitality establishments.

## 2. Protocol and etiquette in an accommodation establishment

Protocol is dynamic and specific and should be regarded as a guide to acceptable behaviour. It also formalises channels of communication between people as it proposes a combination of good manners and common sense. Etiquette is the body of manners and forms prescribed by custom, usage or authority. It is accepted as correct behaviour when people deal with one another. Etiquette preserves respect for the rights and dignity of others. In short, etiquette is good

manners. In a contemporary world many of the old established customs are blended with less restricted ways of life and entertainment and communication between people (Department of Foreign Affairs, 2006).

People often tend to interpret and judge the actions of others based on their own cultural orientations. This can lead to misinterpretation, friction and even unfriendliness because of cultural differences. In South Africa this is even more noticeable because of the diversity of culture present in the country. For example, who goes into a room first or how do you greet another person? Together with this we have to have good manners, be tolerant, thoughtful, act in goodwill and respect other people and their possessions. In other words, treat others in the way you want to be treated.

The following general rules apply with respect to protocol and etiquette:

- Always be polite, use “please” and “thank you”. Treat everyone with respect, from your seniors, to cleaners and guests.
- Do not address guests by their first names.
- Certain clothes make a negative statement. It is considered inappropriate for women to wear revealing clothes to the office.
- Don’t disclose the confidential information of guests that you have been trusted with to anyone.
- Do not do your hair, nails or makeup in your office, especially when dealing with unexpected guests arriving.
- If you have to eat in the office during office hours, keep your desk neat, especially when you have to deal with unexpected guests.
- Do not leave the office unless you inform a colleague about where you are going and how long you will be out.
- Inform your colleagues if you have to leave early or if you will be arriving late.
- An establishment should appear neat and orderly at all times.
- Official working hours should be adhered to.
- Healthy, clean plants in an office create a good impression.
- Confirm reservations nearer to the time.
- Be punctual and have all relevant documentation available.
- Be prepared for the arrival of guests.

The following guidelines will help to inform employees regarding the broad consideration of protocol and etiquette that is practised in South Africa.

## Protocol and etiquette

### 2.1 Before the visit

Provide advance information to your guests including:

- weather conditions in your area;
- background information (newsletters, bulletins);
- if your guests are driving, provide them with complete directions, including a map.

### 2.2 Welcoming guests

The first impression always plays the most important role when a guest arrives at the hotel, and influences the rest of his/her stay. The following guidelines should be adhered to when welcoming guests:

- The receptionists should always be warm and friendly when they check in guests to make them feel comfortable.
- A well-spoken, friendly receptionist will succeed by giving a smile and create a warm and friendly atmosphere.
- It is good to be able to recognise the guest's personality and to adapt in order to satisfy the guest's expectations.

Techniques that can be used are:

- Maintain eye contact and smile.
- Be clear in your speech and use a pleasant tone of voice.
- Avoid speaking too fast or too slow.
- Use the guest's name.
- Start and end with a positive note.
- Be friendly, interested and helpful, and never be mechanical, indifferent or impatient.

When an urgent and unexpected task occurs and guests must wait, avoid alienating the guests by doing the following:

- Take the trouble to make an apology in person and tell the guests how long they must wait.
- Offer refreshments and reading material. This is certainly an occasion to pamper your guests.
- Do not keep guests waiting longer than 10-15 minutes.

- If you cannot get away from the urgent task delaying you, arrange for somebody else to help the guests.
- Restoring goodwill should be your top priority.

There is a big possibility that when a guest leaves a hospitality establishment with a good impression they are likely to return.

### 2.3 Make the stay an enjoyable experience

- Handle check-in and inspect the room thoroughly before your guests' arrival.
- Deal with any problems prior to your guests' arrival.
- Prepare a welcome packet with information about the area and some regional publications.

### 2.4 Departure

The following should be considered when guests depart:

- Attend to your guests' departure with the same care you gave on their arrival.
- Handle checkout for your guests and arrange for their luggage to be picked up.
- Treat your guests as you would a family member or close friend.
- Ask yourself: "How would I wish to be treated if I was the guest?" Act accordingly.

### 2.5 Telephone protocol and etiquette

The first contact with an institution is the most important. This reflects on the firm's general image, performance, skills and attitude.

#### *Incoming calls*

The following protocol should be observed during incoming calls:

- Try to answer the telephone by the third ring. Apologise immediately if there was a delay.
- Answer promptly and speak slowly and clearly.
- Greet the caller and identify yourself and the name of the guest house, for example: "Rhodes Guesthouse, Chantal speaking, how may I help you?"
- Do not talk aside to colleagues whilst on the telephone.
- Do not talk with food in your mouth.

## Protocol and etiquette

- Speak into the telephone mouthpiece.
- Do not cover the mouthpiece with your hand.
- Use positive vocabulary.
- When speaking on the telephone don't say the following:
  - Hello. Say "good morning" or "good afternoon".
  - Cheers. Say "goodbye".
  - Sorry. Say "I regret".
  - OK. Say "all right".
  - Who is it? Say "May I ask who's calling?"
- Be friendly and helpful by using expressions such as: "May I help?"; "I am sorry to keep you waiting"; "Would you care to leave a message?"
- If you are unable to help, try to find the correct person to deal with the issue and transfer the call.
- Offer to phone back if needed, and make sure you do.
- Do not use office telephones for private calls.
- Do not slam down the telephone, place it down gently.
- End your call on a positive note, for example "I enjoyed talking to you"; "Thank you very much for your time"; "Please contact us again if we can be of any assistance".

### *Putting callers on hold*

The following aspects should be considered when a caller is put on hold:

- Be careful of discussion with colleagues or making remarks while the line is still open.
- Do not put a caller on hold for longer than a few seconds.
- Give a caller the choice of leaving a message or holding on.
- Always thank the caller for holding.
- Do not shout to a colleague that a call is waiting.

### *Making a call*

The following should be considered when a call is made:

- Be sure you have the right number and area code.
- Dial slowly and accurately.
- Identify yourself and your organisation.

- When calling on behalf of someone, make sure the person receiving the call knows to whom they will be speaking to. “Mr. Oliver, please hold on for Mrs. Smith from the Rhodes Guesthouse”.

#### *Taking a message*

The following should be noted to ensure messages are taken effectively:

- Who the message is for.
- The caller’s full name, as well as telephone or cellular phone number.
- Date and time of call, the reason for calling , and whether it is urgent.
- Name of the person who took the call.
- Keep a notepad or answering book for noting all calls and messages.
- If you take a message for a colleague, make sure you have all the relevant information, take down the message without interrupting the caller and deliver the message promptly.
- Return calls as promised. If a senior staff member needs to reply make sure that you have given them all the relevant documentation and information.

#### *Using cellular phones during working hours*

The following guidelines apply to using cellular phones during working hours:

- Be considerate when and where you use your cellular phone.
- A cellular phone should not ring during working hours.
- Never let cellular phone calls interrupt helping a guest – the guest was there first. If you have to answer the cellular phone, let it only be to say that you will phone back.

#### *Smoking during working hours*

The following guidelines apply to smoking during working hours:

- Never smoke in another person’s office.
- If there are no ashtrays, this indicates no smoking.
- Do not use plates, saucers, cups or dishes as ashtrays if no ashtrays are available.
- Be tidy with ashtrays.

### 3. Cultural differences

Different cultural groups react differently when greeting guests, as well as in matters like social distance, touching and gestures. Some aspects are highlighted below.

**When greeting guests:** Even something as simple as handshakes differs from country to country. Some people like to give you a very firm handshake and consider a sign of strong character. Other might give you a soft handshake.

**Social distance, touching and gestures:** Watch out when using hand gestures, as they are far from internationally uniform. What may be a friendly sign in South Africa could be an insult in another country.

- Every culture defines proper distance. Westerners generally find that the Chinese comfort zone regarding distance is a bit too close for their comfort.
- Westerners may instinctively back up when others invade their space. Do not be surprised to find that the Chinese will simply step closer.
- The Chinese do not like to be touched, particularly by strangers.
- Do not hug, backslap or put an arm around someone's shoulder.
- Western gestures that are taboo for Chinese people include:
  - Pointing the index finger. Rather use the open hand.
  - Using the index finger to call someone. Use the hand with fingers motioning downward as in waving.
  - Snapping one's fingers.
  - Showing the soles of shoes.
  - Whistling is considered rude.
- Chinese customs that are annoying to Westerners:
  - Burping or spitting on the street.
  - Lack of consideration when smoking and failure to ask permission to smoke.
  - Slurping food.
  - Talking while eating.

### 4. Different types of guests

It is important to know what type of guests you will receive and to treat them accordingly. The different types of guests that may visit a hospitality establishment include:

- **Tourists:** Tourists usually travel for sightseeing, recreation and non-business activities. They want to learn about the customs, the history and the language of every place they visit and usually travel in groups. Any information that they may need about the area, transportation and local events that may take place in the surrounding area must be available to them. Tourists usually require recreational facilities, food and beverage services and interior design. They are usually very price-sensitive.
- **Families:** Families usually travel on weekends and school holidays and they want a short break from their everyday routine. They are looking for a quiet place to relax, including recreational facilities, and food and beverage services. Baby-sitting facilities and special meals for kids should also be available.
- **Seniors:** Seniors are usually looking for a place with a pleasant and friendly environment. Employees have to be kind and patient with seniors and look after them without giving them the impression that they cannot do anything for themselves.
- **Business tourists:** Business tourists are almost the most important travel market for many hotels and guesthouses. Business people prefer to stay in a quiet place to rest and to relax rather than a noisy place. We have to offer them facilities such as a meeting space, computer services, internet access etc., because in this way they will visit again.
- **Disabled tourists:** Be sensitive to the condition of disabled tourists when they arrive. Look at the person and not the disability. A physical impairment is noticeably different from a mental one, therefore give attention to what type of disability the person has.

## 5. Summary

The professional application of protocol principles and etiquette may have a competitive advantage for businesses in the hospitality industry. It is important that hospitality staff should be well informed about protocol and etiquette.

## Reference

Department of Foreign Affairs. 2006. *Protocol training manual: South African protocol and etiquette*. Available from: <http://www.salga.org.za/documents/download/app/webroot/assets/files/MPAC/PROTOCOL%20TRAINING%20MANUAL.pdf>.



# Design and décor considerations

*Marianne le Roux*

## 1. Introduction

The interior design and decoration of a hospitality establishment is a very important consideration, as it conveys the atmosphere and enhances the general impression of the establishment. If the design and décor are thoroughly planned and furnishings are of a high quality it creates a favourable impression with guests. This can also earn an establishment a star rating from the Tourism Grading Council of South Africa (TGCSA). Whether the interior design and décor is planned from scratch or requires revamping, it is worthwhile to obtain the services of a professional interior decorator or designer. A professional interior decorator or designer is likely to provide a better return on investment as the owner has access to valuable advice and information on the types of furnishings required. This is likely to save costs and time, as well as reduce the stress on the part of the owner.

There is a difference between an interior decorator and interior designer. An interior decorator is concerned with the functional and decorative planning and styling of an area, while an interior designer has specialised knowledge on building construction, building systems and building regulations. It is therefore imperative that the owner of a hospitality establishment should decide which of these professionals, if not both, meet their needs best. Before planning commences, the owner should decide which strategic focus the business should have and the types of guests they want to attract. This is essential as it will influence the interior design decisions to be taken.

Other factors such as the location, personal preferences and budget will also influence the interior design decisions. It is also advisable that owners should have a clear indication of the costs involved, and a detailed budget should be drafted which includes aspects like fees charged by the interior decorator, timelines and accountability. A legal contract can also be signed wherein all

these issues are stipulated. Although the services of a professional interior decorator can be utilised, it is advisable that owners have some knowledge about the elements and principles of design – which is the aim of this theme. The theme will also relate the requirements of the TGCSA for those establishments wanting to acquire a star rating.

## 2. Elements and principles of design

When planning the layout of a room it is like starting to paint on a clean canvas. The design starts unfolding while using various elements and principles of art, intentionally and unintentionally. The elements of art consist of line, form, shape, pattern, texture and colour. These elements are combined using various principles of art to give a pleasing composition or design. The principles of art are balance, rhythm, proportion, scale, emphasis, harmony and unity.

The most important aspect to remember when starting to furnish a room or area is that there should be equal distribution of ‘visual weight’. Furniture placement is an easy method to create balance in a room. Different colours, shapes, sizes and textures all help to create balance. For example, dark furniture looks heavier than light tones and a glass table appears to be lighter than a wooden one. Different textures also influence the apparent weight of an object. Coarse textures seem heavier than smooth ones, while shiny objects appear larger than dull ones. Fully upholstered furniture gives the feeling of weight, while open leg pieces appear less heavy.

A balanced room should have equal visual weight on all sides. Formal balance is where the two sides of a room is a mirror image of each other. Two three-seater coaches opposite each other are likely to be more formal and less interesting than one three-seater sofa opposite two reclining chairs. The latter type of placement represents informal balance. The visual weight is more important than the actual dimensions or shape of the pieces of furniture. Architectural features can also be balanced with furniture, for example two wingback chairs in front of a fireplace will create a cosy sitting area. A grouping of furniture like a Queen Anne chair with a side table and lamp can balance a two-seater sofa. In the evening when artificial light is used, the balance of a room will also be altered. The correct placement and height of light can help to still have balance when there are extra shadows in the room.

Every room should have a focal point as this represents the area or object that draws attention first. A focal point creates dominance and subordination in a room which prevents monotony or overstimulation. It is important that the rest of the room support the focal point to help the eye move rhythmically through

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the whole area, otherwise there will be no balance. Architectural features like a fireplace or a window with a beautiful view can be natural focal points.

Emphasis can be created by using the following guidelines: Furniture arrangement around a natural focal point gives the room a purpose; for instance the grouping of furniture facing a window with a beautiful view. If there is no natural focal point a seating area can be grouped to face a beautiful piece of furniture like a big armoire or a large painting. Large objects like furniture or paintings create emphasis through size.

The size of the object must still be in proportion to the rest of the room. Secondary focal points will be necessary in large open areas or rooms. Secondary focal points can be created by placing a beautifully upholstered chair next to a small table with a reading lamp on. In a dining area the tables can be the focal point, while a server with a mirror, painting or group of paintings above can create a secondary focal point. In a bedroom the bed area is likely to be the point of interest and a large chair with a beautiful scatter cushion or clothing stand could be a secondary focal point.

If there is no natural focal point emphasis can also be created by using repetition or contrast. In a room where all the textures are smooth, a rough textured sculpture or object can create a focal point. When the colour of the object is different to the rest of the room it will also stand out and draw attention.

Another important design principle is rhythm. Rhythm is the organised movement through the composition of a room to create unity and harmony. Rhythm can be created through repetition, transition, contrast and progression. The repetition of forms, textures colours and patterns creates rhythm or movement because the eye follows the repetition of the elements through the room's composition. Too much repetition leads to monotony and too little results in a lack of unity. Creating rhythm through progression is more dynamic than repetition because one of the qualities of the composition is changing gradually. The colour can change from light to dark or forms can change from small to large.

Curved lines are an example of creating rhythm through transition. The uninterrupted flow of the back of a curved sofa or an arched window creates subtle movement. Rococo or art nouveau furniture and art are good examples of rhythm through transition. Rhythm through contrast is the deliberate use of opposites or abrupt change. This type of rhythm is exciting. Upholstered furniture used in combination with glass or wooden furniture create movement through contrast. High and low furniture can also be used together to create interest and movement, especially if they move away from the walls.

Placing any furniture pieces, paintings or any object in a room creates lines. It is important that the lines in the room should relate harmoniously to each other. Placing a sofa diagonally across a room does not create harmonious lines. The sofa should rather follow the lines of the room; furniture does not have to be facing like in a waiting room at the dentist. Reclining chairs next to each other opposite a sofa often feel less formal than if they are put at a slight angle towards each other. The positioning of paintings also creates lines in a room and should preferably be hung at eye level. This means that in a passage it will hang higher than in a sitting or dining area because people will be looking at it from a standing position.

A gallery or straight line arrangement works best. Pictures will only be hung in a diagonal line on stairs because this will lead the eye upwards in the direction of the stairs. With a grouping where the frames are more or less the same size, use an imaginary line on the side or at the bottom of the composition to hang them neatly. With pictures of different sizes use an imaginary line through the middle to arrange them in a successful manner. The height of the pictures should relate to the rest of the room, furniture pieces and architectural features like doors and window.

All objects and furniture in a room represent different forms. The space around the forms is empty and should be well planned to form a harmonious composition together with the filled spaces. Space should be used creatively to make a room appear interesting. Furniture pieces should be arranged towards each other to create open or 'breathing' spaces. Furniture should not be put in the traffic flow areas as this can create unnecessary obstacles, especially for disabled persons. To increase spaciousness furniture should be placed near and parallel to the walls and small-scale furniture textures and patterns should be used. Floor areas should be more exposed by using open leg furniture, as well as transparent pieces like Perspex or glass.

Mirrors also create depth, and wall-to-wall floor coverings should be used in the same colour that extends into the next room. Full-length curtains in inconspicuous colours, patterns and textures will recede rather than stand out. A light cool colour scheme is also likely to create a sense of space. When a room or area seems too large and impersonal it can be made to look more intimate when the area is divided into smaller areas, both physically and visually, around specific activities like a grouping of chairs around a coffee table. A small sitting area could be arranged in another part of the room grouped around, for example, a television. Each area should have its own carpet and the height of the furniture should be varied to create an interesting

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atmosphere. Larger scale and fully upholstered furniture should be used, as well as contrasting colours and textures.

The use of accessories like paintings must also be sensitive to balance, rhythm, line and space. These accessories must be handled as an extension of the furniture with which it is used. A painting or group of paintings above a sofa should not be too high above it that it appears to be standing alone. Instead, it should be lowered not to touch a seated person's head. In this way the two pieces would appear as a single visual unit. The scale of a painting or mirror should be in relation to the furniture piece it is used with, a grouping rather than a small object above a server or sofa would look more in proportion.

Another design principle that goes with scale is proportion. The proportion and scale of a room refers to the relationship between various parts of the room, as well as to the room as a whole. Objects of different sizes and the area around them should be in balanced relation to each other. In a large room it would feel awkward to place one chair with a small pot plant next to it. The proportion and scale would not feel right. A larger sofa with a tall plant in a large pot would work better. The size and shape of a room will determine the size and the amount of furniture that would fit in it. A small room with huge furniture pieces will not feel comfortable.

A spacious look calls for small-scale furniture in light colours. Colour, line and texture influences proportion the most. Reflecting, coarse and patterned textures, as well as bright colours, draw attention and will cause an object to appear larger and heavier. Horizontal lines broaden and shorten an object, while vertical lines create length and make an object appear more slender. These design elements can be used very successfully in creating optical illusions. Vertical lines on curtaining fabric can make a window seem taller, while draped curtains makes a window seem shorter and wider. Draperies in colours strongly contrasting with the walls will draw attention to the window, while draperies of a matching or toned version of the wall colour will recede and make the room appear larger and more spacious.

Colour is the design element which has to the biggest influence in interior decorating. The first aspect someone notices when entering a room is usually the colour or the feeling of the room. Colour has three characteristics, namely hue (the name of the colour), value (the lightness and darkness of a colour) and intensity (the brightness or dullness of the colour). By combining and varying different hues, values and intensities, different colour schemes can be created.

Colour schemes can be divided into two groups, namely related and contrasting colour schemes. Related colour schemes (monochromatic, achromatic and analogous) are created when colours next to each other on the Prang colour wheel are being used. In contrasting colour schemes (complementary, split complementary, double complementary, triad and tetrad), colours on opposite sides of the Prang colour wheel and in different configurations are combined. Warm colours are those with a yellow undertone, like orange, yellow-green and red-orange. Cool colours are those with a blue undertone, like blue-green, blue-violet, violet, blue etc.

Colours have a significant influence on each other and on people. White and light colours reflect light and make colours used with them appear darker. Black and dark colours absorb light and also make colours used with them appear darker and more intense. Warm colours make an object appear larger and closer, while cool colours make objects seem to recede. This means that a red chair will seem much larger in a predominantly white room. Black and dark colours makes objects seem smaller, while white and light colour make them appear bigger. Where a white and black chair of the same size and shape are put next to each other the black chair will appear smaller than the white one.

This phenomenon can be used to create successful optical illusions in a room to enhance more pleasing proportions. A white ceiling gives a room more space, while a dark ceiling make the room appear smaller and cosier. Where there are many doors and windows in the same room, painting them the same colour as the walls will recede them into the background. A light floor gives the feeling of gracious space.

There are also different emotional connotations to colour which could influence the choice of a colour scheme for a specific room or atmosphere. Light cool colours suggest freshness, restfulness and peace (here one thinks of turquoise and light green). Light warm colours (apricot/cream) elicit cheerfulness and happiness. Dark colours are richer, bolder and nobler. Bright warm colours suggest excitement. Texture plays an important role in the appearance of a colour and should be kept in mind when planning a colour scheme for a room.

Textures can be classified as smooth, medium or rough; hard, medium or soft; or shiny, medium or dull. Shiny, hard and smooth textures have more or less the same effect on colour. Rough textures break up light and create a soft, rich appearance with a lower intensity. Coarse fabric or fabric with a high pile appears duller than a smooth fabric in the same colour. Bright, smooth textures can easily irritate the eye, but the same colour in a rough or uneven texture

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is more acceptable. Colours in coarse textures blend much more successfully than smooth, shiny textures which highlight and accentuate and may look harsh together.

When choosing a colour scheme for a room the following questions should be asked:

- What is the purpose of the room?
- What effect wants to be achieved?
- Which colours would best express the desired effect? (It is advisable that unique colours should be used.)
- Will this colour scheme relate to the target market and be unique?

When these aspects have been ascertained the background colour can be selected. The background colour will cover the largest surface and decisions should be made on whether it should be light or dark. The exact colour (hue) should be selected next in accordance with the atmosphere that needs to be created. The value and intensities of the colours should be varied to create an interesting colour scheme, and the amount of colours should be limited to a maximum of three. Bright colours should be used as accent colour in small amounts.

### 2.1 Lighting

Good lighting plays an important role in the way people experience their surroundings and how they assess their experience. The key to successful lighting is the correct combination of decorative and functional lighting. It gives structure to a room and makes guests feel secure. There are three important aspects to consider when planning the lighting of a room.

- What to light?
- How to light it?
- What to light it with?

Three types of lighting that can be applied to a room are task lighting (where a specific task, like cooking or reading, will be performed), accent lighting (to draw attention to an object or place) and general or ambient lighting (overall light). A well-planned lighting system will include all three types in a suitable blend in the most cost-effective way.

When choosing light sources and fixtures it is important to consider energy conservation. The effectiveness, lamp life, colour and rendering of the source

will play an important role. It is important to realise that what we see is what is being reflected from a surface. The surface thus plays an important role in the planning of the lighting. Dark objects will absorb light while shiny surfaces will reflect it. The colour of the light will also influence the amount and manner of reflection.

Before planning the lighting of an area the following aspects should be considered: the function of the area, the activities that will be performed therein, the items and architectural features that require accentuation, how frequent an area will be used, and the atmosphere that needs to be created. A single light in a room will not be sufficient and the layering of light for different functions will be more successful.

A more spacious feeling can be created with lights on upper walls and ceilings, and soft pools of light around furniture create a feeling of intimacy. Glittering light from crystal or shiny metal can create feelings of festivity, while direct lights on marble or glass surfaces can cause unsettling glares. Every room should have a focal point where the light is focussed on a specific object, for example a large picture in the sitting area or the counter in the reception area. The light source and light fixture are also important factors in determining the effect of light. The light fixture must not only support the light source but also transmit the output to the required areas and protect it from causing glare. The light source, colour reproduction, colour appearance and maintenance cost must all be considered in the planning of the lighting. Generally, fluorescent light gives a wider distribution, while LEDs give a narrower distribution. A versatile system that can be changed as the day/occasion changes is a good option. Modern technology offers a wide variety of solutions to different lighting needs.

Accent lighting is necessary at the facade of an establishment where guests get their first impression of the business. Lights in the facade should be welcoming and impressive. Lighting also plays an important role in the safety of guests and personnel, so be sure to light pathways and working areas adequately. General light in this area should be well-planned and lighting control is important for visual comfort and saving energy. Surface mounted lights on the ceiling reflect light upwards and downwards to provide a broad distribution of light, whereas wall mounted fixtures may provide good layering of light. In the dining area the food, people and table settings must draw the attention.

A light shining down on the table to enhance the colour and texture of the food is a good choice. The light should also flatter the diners and the table setting. When using recessed lighting over a table it should extend over the edge of the table. Down lighters should not shine on guests as it can create unpleasant

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shadows and be too warm. All light sources should be in proportion to the table and the room. Guests should never hit their heads against any lights hanging too low over a table, and seated guest should never be able to see a lamp in a lighting source.

Light should be planned around the various purposes of a room. Food service areas need well-planned functional lighting. A general light in the dining area, as well as additional decorative lights, create a peaceful atmosphere. Accent lighting in a dining area could be used on a flower arrangement or an artwork. Food arranged on the buffet should have shadow-free light situated under a top shelf or down lighters from the ceiling. Blue-white light makes food look more appetising, but takes away the warmth of a romantic atmosphere. A balance of seventy percent blue light and thirty percent warm light is more conducive to appealing food within a warm and inviting environment. Bright lights tend to make customers eat faster and should be used in locations where fast turnover is needed.

In the living areas the lighting should accommodate various activities. Usually a large painting or group of paintings is used as a focal point. The light source that creates the focus should preferably not be visible. When strip lighting is used the light source must be at a thirty degree angle with the wall to ensure the light reflects on the floor and not people's eyes. In a bathroom a single general light is not enough. As a focal point the mirror can be lit, because most activities like makeup, shaving and dressing takes place there. The mirror must be free of any shadows.

A single down light usually does not provide enough light and casts shadows on the person in front of the mirror. Two long, slim fixtures on both sides of the mirror usually gives the best results. The installation of a night light in a toilet is a good idea. Occupancy sensor lights will help to conserve energy. A dimmer switch, which enables people to control the amount of light needed, is also advisable. The lighting system must be in accordance with the colour scheme of a room. Warm lighting is more suited for a warm colour scheme, while bright light suits light colours best.

### 2.2 Flooring

Floor covering is important for the aesthetics and ambience of an establishment. The affordability, durability, hygiene, safety and environmental sustainability of floor coverings should be critically evaluated. Floor coverings can be classified in terms of hard floor coverings (including brick, concrete, stone, wood and tiles), resilient floor coverings (including vinyl, rubber, cork and

laminated floors), and soft floor coverings (carpets). Hard floor coverings are very durable and versatile. Their biggest disadvantage is their initial high cost and lack of resilience. Coloured concrete is currently very fashionable and can be obtained in many different colours. These hard floor coverings can be sealed and polished to give different effects. Porcelain or ceramic tiles remain a classic choice. Currently oversized white porcelain tiles are highly in demand. These large tiles are an excellent choice for entrance halls, kitchens and living areas. Classic colour tiles are timeless and versatile and harmonise with a large variety of interior decorating styles.

Resilient floor coverings are cost-effective and durable. Laminated flooring comprises of a fibreboard base with plastic lamination which can be decorated with several designs, including the appearance of wood. A protective layer finishes the surface. These types of floor coverings are affordable and can be used in any part of a building, except where it will be exposed to water spillage. The laminated fibreboards cannot be refinished, and direct contact with water will cause them to swell and cause permanent damage. However, new technology has improved the longevity and appearance of these products. Although laminated floors are in demand, they can be very noisy.

Soft floor coverings include rugs and carpets of different textures, fibre content and colour. Carpets add warmth and comfort and can be formal or informal. Carpets offer heat insulation and reduce noise. Technology has created a carpet for every area, from rugged industrial to soft and luxurious. Carpets or rugs can also be used to define an area, for example the sitting area, lounge or hallway.

Regular cleaning and immediate spot treatment can make a carpet last for a very long time. When selecting a floor covering the following criteria influence the choice of soft floor coverings and must be considered:

- durability (the most important aspect because floors take severe punishment);
- warmth;
- light;
- reflection;
- sound absorption;
- flammability;
- area appropriateness.

Floor coverings have to be as safe as possible. The general view of safety flooring is floor coverings that have been treated to decrease the possibility

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of someone slipping on the surface. South Africa unfortunately does not have legislation that governs the testing of safety flooring. It is important that flooring should be slip-resistant and slip-resistant material should also be free of friction. This is especially important for people in wheelchairs to be able to move without too much friction, vibration or noise. Highly polished surfaces in open circulation areas or stairs are dangerous, and shiny surfaces can make it very difficult to detect changes in levels. Slip-resistant surfaces should also be used in areas such as kitchens, bathrooms, toilets, changing rooms or floors that have to be washed often.

Hazard profiles need to be displayed where there is transition of levels, for instance steps, stairs, escalators and ramps. Single steps are hazardous because people don't see them. Where there is a ramp, the gradient must preferably be 1:15 to prevent slipping, especially for people in a wheelchair. It is important not to have gaps between surface finishes or raised thresholds to prevent tripping. The following can be helpful to make sure floor coverings are safe.

- Prevent differences in levels between surfaces and thresholds.
- Remove any trip hazards and single steps and provide handrails on both sides of stairs.
- Use visual and tactile guidance around obstacles. Make sure that a person in a wheelchair will be able to move by themselves and people on crutches will not slip.
- Put out warning signs at the top of stairs, escalators, stair edges and ramps in colour, lighting contrast or both.
- Avoid shiny, reflective surfaces.
- The flooring must provide easy movement for everyone – especially people in wheelchairs. The flooring must provide good acoustic quality.
- The pattern/design on the flooring must not be confusing and make it difficult to follow a route through a building. Differences in surfaces can be used to define space, and differentiate different areas from one another.

Practicality, hygiene, comfort, safety and durability are the most important considerations when choosing kitchen flooring. Maintenance is also a very important consideration. The kitchen floor must look good without too much effort. Ceramic tiles are a good choice because of their durability, wide range and sanitation properties. The biggest disadvantage is the fact that they are very slippery when wet and that the grout must be regularly steam-cleaned and re-grouted. Seamless floor covering is a far better choice because it has excellent

hygienic properties. These floors are seamless, nonporous, very durable and affordable and can be made nonslip as well. Rubber flooring is another good choice. These floors are resilient, not as slippery, hygienic, durable, safe and easy to clean. Rubber floors are environmentally friendly and are available in tiles which can be installed on top of existing floors.

### 2.3 Wall coverings

Walls make a major contribution to the aesthetic appearance of a room. These large visual surfaces' texture and colour have a major influence on the style and atmosphere of the space they enclose. The walls should actually be the first consideration in planning a space, and wall coverings should be chosen according to the activities and functionality of a room. Wall coverings can either make a room look more spacious or intimate, vibrant or peaceful, cluttered or empty, and determines its formality. The scale of the wall covering should be in relation to the furniture and the rest of the furnishings in the room.

A flat, inconspicuous wall covering and continuity in colour extending into neighbouring rooms create a sense of space. If a wall is the focal point in a room, coarse textures, bright colours or patterned wallpaper can be used successfully. Furniture and other space-fillers will complement the wall, and different wall finishes in the same room can also be applied to create interest. The durability of the wall covering will play an important role in the choice between paint, wallpaper or other more permanent fixtures such as wall panels, coarse bricks or stone.

Paint is the fastest, easiest and least expensive way of covering a wall or changing the atmosphere of a room. There are a wide variety of colours, textures and finishes to choose from. Colours are usually darker than on samples and different walls are likely to reflect each other. The amount of light in a room, the furniture, and floor and ceiling coverings will all influence the colour that is reflected. Wallpaper is a very popular way of covering walls and can make a profound statement, especially in an entrance space or function venue.

These days fabric can be engineered to be pasted on walls, so the decorative possibilities are endless. There are a wide variety of textures, colours, patterns and special effects available. Wallpaper can be used as an accent or on all the walls in a room. It can also be used with paint to achieve different effects. It should be kept in mind that bold designs or patterns may become tiresome and it is not as easy to remove or redo as a painted wall.

### 2.4 Furniture

The correct choice of furniture is important. Furniture that is made with the correct dimensions and measurements can encourage guests to stay longer or return more often. Anthropometric and ergonomically designed furniture incorporate the physiological, psychological and physical size of people and design area-specific furniture for e.g. dining chairs should support the back. Fine dining establishments want their customers to linger longer and therefore furniture is more expensive and comfortable. Comfort and strong design is very important in choosing, especially, chairs. Furniture is a long-term investment and more expensive furniture that is of a good quality is the best option.

Chairs in different finishes and colours can add interesting character to an interior. Low maintenance fabric such as leather should be considered, as well as chairs that need no upholstery. Metal base tables with an inexpensive top are often used because it can be covered with a table cloth. Where possible table tops like marble, granite, wood and various synthetics are also used to eliminate the use of tablecloths. Weight and stackability are also a considerations to bear in mind when choosing furniture. Combinations of styles are interesting, but a clean, minimalist appearance seems to stay popular.

#### 2.4.1 Furniture arrangement

To have a comfortable, convenient and functional establishment, it is necessary to plan properly when furniture is arranged. The planned purpose and activities (watching television, reading, dining, engage in conversation etc.) of an area will determine the furniture arrangement. The planning process can commence with drawing the floor plan of the room on scale on graph paper or a computer to facilitate the arrangement of furniture. The drawing must indicate all door openings, windows and other permanent fixtures in the room. Wall elevations should be drawn to make sure the furniture, doors and windows are in proportion.

Furniture should be drawn on scale so that it can be placed on the floor plan and moved around easily. The traffic patterns and flow in a room should be considered. Furniture should not be placed in the traffic flow areas and areas should be measured to make sure there will be enough space for the anticipated activities. The arrangement of furniture pieces can now be done without having to move heavy pieces around.

Caution should be taken that glaring light from outside does not cause visual discomfort. More than one function may be combined in a small area, and the furniture arrangement may help to create a functional solution. Furniture

placement should enhance the traffic flow in an area and not obstruct it, and traffic should not pass through a conversation area. Proxemics describes the culturally specific way people use space; the overcrowding of a room can make people feel uncomfortable.

In social areas there should be between 1.2 to 3 m of space to accommodate people – more than 3 m is considered public space. With this in mind the furniture arrangement in an area where people will be having conversations must be between 1.5 to 3 m; the optimum distance being 2.4 m. Furniture placement should not hinder the opening and closing of doors or block ventilation or heating systems.

For easy flow of mayor traffic the space must be at least 90 cm wide. All chairs should be within reach of a table to place refreshments. Tables in seating areas must have the same height as the arm of the chair for drinks to be reached and put down easily. Around a coffee table in a seating area there should be a distance of at least 30 cm. When a person is relaxing in a chair or sofa there has to be clear space of 45 cm. For comfortable dining 60 cm per person must be allowed at the table, and to get in and out of the chair requires 45 cm.

Around a dining table there should be a space of at least 90 cm. In a bedroom there should be 90 cm between the bed and the dresser, and to facilitate making the bed a 45 cm space should be allowed. Where there are two beds in a room, there should be 75 to 90 cm between the beds to allow for comfortable movement. In the bathroom there should be 75 to 1 050 cm in front of the toilet to have enough space for most activities. Area rugs can be used to group furniture and activities together, especially in a large space.

#### 2.4.2 Accessories

Accessories are objects that complement the style of the interior and add value to a room. Accessories may include scatter cushions, rugs, sculptures, paintings, collectables, magazines, vases, candleholders, flower arrangements, mirrors and the like. Creative displays like bowls with different types of stones can be used with great success. The grouping of objects is more effective than displaying single objects. Asymmetrical arrangements, different heights and uneven numbers should be used in groupings, together with common elements like colour, theme or texture.

Contrasting colour groupings is likely to draw attention, while monochromatic grouping is likely to blend in with the rest of the room. Varying textures like a fluffy throw on a smooth leather sofa creates interest. Accessories should be in proportion to the room, because small objects may disappear and large

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objects may overpower a space. Larger accessories should be placed first, and then smaller items. Remember that less is more. Accessories are an easy way of altering the look of a room. Smaller items can be changed at a low cost to change the look of a room and colours can be repeated to create rhythm and unity.

Window treatment can instantly change the appearance of a room. The style and atmosphere of the room is likely to determine the type of window treatment. The purpose of window treatments is to create privacy, muffle sound, create illusion, protect furniture and carpets from the sun, control temperature, and serve as decoration. Proportion and scale in the design and patterns used once again play an important role in the aesthetic choice of the curtains or blinds. Large patterns and bold colours are more suitable for larger rooms, while smaller inconspicuous patterns create space.

Vertical lines can make a window appear taller, while horizontal lines will accentuate the width. At a window with a beautiful view the curtains should not draw the attention and should preferably be the same or nearly the same colour as the walls to recede into the background. The type of fabric as well as its texture will be determined by the style of the curtains and the formality and atmosphere in the room. The colour will be determined by the colour scheme and situation of the room. North-facing windows can use cooler colours, while south-facing windows can be decorated with warmer colours.

The colours of the curtains and other accessories should be repeated to create harmony and unity in a room. Curtains and blinds give different effects and must be chosen carefully. Fabric blinds uses less fabric than curtains and give a modern, minimalistic look. There are a wide variety of blinds available on the market and blinds can be used on their own or with curtains.

### **3. The star rating system for accommodation establishments**

The star rating system was first introduced in 1912 by the AA Hotel Services to reward establishments for the value and variety they offer to guests. The TGCSA star grading is an official worldwide ranking system to assist travellers in selecting accommodation that meets their needs. The star grading can be explained as follows:

- 1 Star: Fair to good quality in the overall standard of furnishing, service and guest care.
- 2 Stars: Good quality in overall standard of furnishing, service and guest care.

- 3 Stars: Very good quality in overall standard of furnishing, service and guest care.
- 4 Stars: Excellent quality in overall standard of furnishing, service and guest care.
- 5 Stars: Exceptional quality and luxurious accommodation. Highest standard of furnishing and impeccable service are rendered to customers.

The TGCSA revised their grading system in 2013 and sixty-three areas were identified according to which accommodation establishments could be assessed. The final grading decision lies with the TGCSA Awards Committee. According to the new grading system, provision for persons with disabilities is more pronounced and demands better access for individuals with mobility, sight or sound disabilities.

An establishment will not be penalised if they do not make provision for all three disabilities – one or two is considered sufficient. The categories the grading system assesses include exterior buildings, bedrooms, bathrooms, shared areas, dining areas, general issues and housekeeping. The following section provides a brief description of each of these categories. The categories apply to the basic requirements that are applicable to all star-rated accommodation. Detailed documentation can be found at: <[www.tourismgrading.co.za](http://www.tourismgrading.co.za)>

### 3.1 Building exterior

#### *Appearance of the buildings*

- An acceptable to outstanding appearance with only minor to no maintenance issues are considered acceptable.

#### *Ground and gardens*

- With environmental concerns, seasonal changes, water availability and water usage taken into account, the grounds and gardens must be well maintained, tidy and safe. Suitable garden furniture is an advantage.

#### *Universal accessibility*

- Clear signage and pictograms should be visible.
- Pathways should be free of any obstacles and be slip-resistant. No canopy structures should protrude into pathways, and they must not be lower than 2.1 m. A route with no steps and a hard and even surface must be provided, as well as textured surfaces on all ramps, stairways and main walkways.

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### *Parking, driveways and signage*

- Well-marked, clearly visible signage according to municipal bylaws must guide guests to tidy and safe parking areas and the appropriate entrance.
- Clear signage and pictograms must be present. Where steps are present, a route with no steps must be provided. A marked parking bay of 3 500 mm must be available. A slip-resistant ramp with an optimum gradient of 1:15 must be available. Entrance ways must be even.

### *Safety and security*

- Suitable safety and security measures must be in place at all times. A representative of management should be available 24/7.
- Emergency procedures must be clearly displayed in English and pictograms should be used where possible.
- Guests must have safe access to the establishment.
- Emergency procedures must be given to the guests in writing. Evacuation areas, as per bylaws, must be clearly marked. All emergency exits and procedures must be communicated to guests upon arrival.
- Guests with a functional disability should be clearly indicated in the system to ensure they are easily located and evacuated during an emergency.

## 3.2 Bedrooms

### *Bedroom entrance, safety and security*

- All emergency procedures should be in writing in each bedroom. Multilingual emergency notices must be clearly displayed.
- The rooms must be able to be locked from inside and outside. Rooms with outside doors must have extra security gates.
- On-site safety-deposits may be requested, or should be built into rooms.
- At least one universally accessible bedroom must be available. If the room does not comply with standards it must be indicated as such in all advertisements.

### *Furniture*

- A bedside table or shelf must be present in all rooms. The bedside table may be freestanding or part of a headboard combination.
- The furniture, furnishings, fittings and floor coverings must be in good condition without tears, holes, breakages or cracks. A dressing table with a suitable chair, as well as extra seating per person may be added.

### *Electronic appliances*

- If an establishment has more than five rooms there should be a multichannel remote controlled colour television (screen 60 cm) with excellent picture quality in every room, or at least one (screen 80 cm) in the residents lounge.
- A hairdryer should be available in each room.
- Induction loop extensions or earphones must be linked to the television.

### *Wardrobe, shelves and luggage storage*

- An appropriate number of coat hangers must be available in a suitable clothing hanging space for full-length garments.
- There should be at least one drawer/shelve per person per room.
- For extra grading, additional storing facilities for pillows and blankets should also be accommodated for. Extra luggage stands may also be provided.
- Easy to grasp door handles at 80 to 120 cm height on wardrobe doors should be evident.
- Hanging rails should be at least 140 cm from the floor.

### *Curtains and window coverings*

- Good quality, easy drawn, lined or unlined window dressings that cover the complete length and width of the window must be present in each room.
- Pull-rods or closing cords must be provided.

### *Flooring, ceiling, skirting and cornices*

- Flooring, ceilings, skirting and cornices should be of acceptable quality and in good condition.
- Slip-resistant, level and properly fixed floor coverings should be evident.

### *Bedding and linen*

- All bedding (sheets, pillowcases, blankets, bedspreads/quilts/mattresses) must be the correct size and in a good condition.
- Pillows and mattress covers are essential. One pillow, two sheets, a blanket or duvet and duvet cover per bed is the minimum requirement. Extra pillows and blankets should be available on request.
- Beds, bases and mattresses should be of a good quality.
- Sofa beds are not acceptable.
- Beds must be accessible from both sides in a double room. The minimum size for a single bed is 188 x 92 cm and 188 x 137 cm for a double bed.

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- Beds should have headboards.
- A firm bed with height of 45-50 cm and length of 92 cm should be used.
- There should be an unobstructed space of at least 120 cm in front of a bed.

### *Temperature control and ventilation*

- Adequate ventilation must be provided. Heating and cooling systems must be remote controlled.
- The remote controls must be placed at a height of between 110 and 120 cm.

### *Lighting, power and switches*

- Light switches should be located at the entrance of a room.
- Good quality lighting should be used, with at least one bedside lamp per person.
- An international multi-power plug should be available.
- Extra light at the dressing and desk may be provided.
- Even lighting should be provided, and light switches and controls should be placed at a height of 80 to 120 cm from the floor.

### *Mirror and mirror lighting*

- A reasonably sized mirror with enough light in a sitting and standing position should be provided.
- A full-length mirror with a power point close by may be provided.
- A mirror should be at least 40 cm from the floor.

### *Accessories*

- A fire evacuation diagram, as well as a list of emergency numbers, must be available in each room.
- Facilities for making tea and coffee should be present in all rooms, with enough crockery per person. An electric kettle with two tea/coffee and sugar sachets per person per room should accompany the kettle.
- Relevant information such as the contact details for local tourist guides, take-away food menus and restaurant information should be available.
- An iron and ironing board should be provided.
- Insect protection should be available in each room.

### *Spaciousness and overall impression*

- There should be enough room for easy movement around the furniture in the room. All drawers, storage facilities and doors should be opened without any restrictions or need to move furniture pieces.
- Unobstructed movement of at least 90 cm around and between furniture.
- No obstacles should obstruct movement in the room.

## 3.3 Bathrooms

### *Type of bathroom*

- All bathroom facilities should be en suite. If not there, has to be a bathroom for the exclusive use of the guest in the room.

### *Flooring and ceiling*

- A water-resistant surface must be provided.
- No design obstructions should be placed on the floor and a slip-resistant floor covering is mandatory.

### *Fittings and fixtures*

- The basin, bath and/or shower should be in a working condition with enough hot and cold water.
- Enough towel rails and hooks for clothes should be provided.
- There should be a mirror above the basin with enough vanity space for the number of guests.
- Windows should ensure privacy.
- The bathroom should be adapted to the standard measurements for disabled persons.

### *Handbasin and toilet areas*

- All toilet areas should have the following: toilet with a lid and a seat, a bin with a lid, double ply toilet paper on a holder, an extra roll of toilet paper, toilet brush and a well-lit mirror near the basin.

### *Towelling*

- Towels must be free of any holes, discolouration, stains or frays.
- A bathmat should be provided.

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### *Lighting and ventilation*

- The bathroom should be well lit and have good ventilation of all parts.

### *Accessories*

- No toilet seat covers or mat sets should be allowed.
- Liquid soap and shampoo should be provided.

## 3.4 Shared areas

### *Decoration*

- Functional, interesting and well-placed *objects d'art* should be used.
- Public areas should be properly marked.

### *Furnishing and fixtures*

- Everything must be in good condition and pleasing to the eye.

### *Bar, lounge and sitting area*

- The guests and host may share this area. There should be enough room for easy movement and the seating area should have enough space, especially if a communal colour television with remote is also situated here.
- The bar counter should be at a height of least 80 cm.
- Table service should be available.

### *Flooring, ceiling, skirting and cornices*

- Everything should be well-maintained.
- Slip-resistant floor coverings should be used.

### *Lighting, heating/cooling and ventilation*

- Adequate lighting, which is well-positioned, safe and comfortable should be used.
- Adequate ventilation and temperature control should be evident.
- Minimum light levels of 200 lux must be provided. It should be even and functional.
- Directional and informative signage must be well lit.

### **Ramps**

- Ramps should have a gradient of 1:12, with a landing area of 90 x 90 cm. It should have an unobstructed width of 90 cm that is textured and slip-resistant, with handrails on both sides (85 cm high).

### **Other public areas, including passages and staircases**

- Public areas, passages and staircases should be well-lit all day.
- No obstructions should be placed in these areas.
- Clear signage and emergency information must be displayed in public areas.

### **Flooring and ceiling fixtures and fittings**

- Everything should be properly maintained and slip-resistant.

### **Mirror and mirror lighting**

- If full-length mirrors are used, they should be 40 cm from the floor with a top height 180 cm.

### **Handbasin and toilet area**

- Handbasins and the toilet area should be well-maintained, clean and well-ventilated.
- The following should be available in the area: washbasin with soap, hand drying facilities, a toilet seat with lid, covered light and a sanitary bin for ladies.
- Nappy changing facilities should be available.

### **Lighting and ventilation**

- Adequate lighting and ventilation should be evident.
- Accessories and other equipment should be in reach.

## **3.5 Dining areas**

### **Provision**

- Dinner may be provided by the host, but does not have to be prepared on-site (this does not apply to bed and breakfast establishments).
- Mealtimes must be arranged with guests.
- Individual tables should be provided.

## Design and décor considerations

### *Furnishings*

- There should be enough tables and chairs for all the guests in all weather conditions.
- Unobstructed access to all furniture with a width of at least 90 cm should be evident.

### *Flooring, ceiling, skirting and cornices*

- Everything should be in a good condition without any signs of deterioration.
- Noise levels should be kept as low as possible.
- Slip-resistant floors with no thresholds or change in levels more than 1.3 cm should be evident.
- Important areas such as the reception counter, entrances and exits and buffet tables should have different textured floors.

### *Lighting*

- Lighting, of a minimum of 200 lux, must be well-positioned for safety and comfort day and night.

### *Menu presentation*

- Professional menu presentation is essential.
- It is preferable that large print and Braille menus are available. Staff may also be asked to read the menu aloud.
- Clear and simple language should be used and where possible suitable symbols or icons should be used.

### *Atmosphere and ambience*

- Appropriate background music should be used.

### *Dinner quality and presentation*

- Food should be served in an appetising manner at the correct temperature.
- Dietary requirement must be taken into account.
- Food should be labelled in large print at the buffet and staff should read the labels out loud.
- Warning signs at warm elements should be clearly visible.

### *Breakfast quality and presentation*

- Hot plates should be provided with hot food if a buffet is used.

- Food should be presented in an appetising manner.
- Cold food should be kept at relevant temperatures.
- Varying dietary requirements (e.g. *halal*, food allergies and diabetics) must be catered for.
- Continental breakfast should be available at any star graded establishment.
- Breakfast menus with various hot items may also be presented at higher rated establishments.
- Food should be labelled in large print at the buffet and staff should be available to read the labels out loud.
- Warning signs at warm elements should be clearly visible

### 3.6 General issues

- Staff should be friendly and welcoming.
- Special attention should be paid to all facets of service delivery.
- Management and staff should be well-trained, also with respect to disabled guests. An audio package with facility information should be provided to guests on arrival. Furniture and other obstructions should be moved and removed according to the guests' requirements.

#### *Appearance of staff*

- Staff should be dressed neatly and professionally at all times.
- Name badges should be worn at all times.

#### *Reception/meet and greet*

- Friendly staff should greet guests on arrival.
- Clear information on the offerings of the establishment should be provided – either verbally or in brochure format. Information should be communicated at the time reservations are made and can include:
  - cancellation policy and house rules;
  - truthful description of amenities, facilities and services available.
- Office hours must be displayed prominently.
- Reception areas must be marked clearly. Reflective panels behind the reception desk can complicate communication.
- Entrances should be clearly illuminated and be free of thresholds and uneven surfaces.

## Design and décor considerations

- Glass doors should be clearly marked and doormats firmly fixed.
- Reservations, and checking and out of the establishment should be efficient.
- Information like property layout, mealtimes and emergency procedures should be clear.
- Orientation regarding amenities, like the location of the swimming pool, dining hall etc., should be available to the guests.

### *Laundry services*

- An iron and ironing board should be available.
- For higher graded establishments there should be a laundry service at least three days a week. A laundry bag should be provided and laundry prices must be available.

### *Meal and beverage service*

- Unobtrusive, well-mannered and considerate service should be provided by professional staff.
- Breakfast is a requirement for any star graded establishment.
- Lunch is optional at one to three-star establishments.
- Dinner is required at three, four and five-star establishments, excluding bed and breakfast accommodation.
- Staff must be knowledgeable about food and wine offerings.

### *Check-out efficiency*

- The bill must be compiled accurately.
- Staff must provide the necessary assistance with check-out procedures.
- Supplementary services such as photocopying, internet access and facsimile facilities should be available.

## 3.7 Housekeeping

### *Provision*

- Rubbish should be removed daily.
- All rooms must be cleaned daily, seven days a week.

### *Bedrooms and bathrooms*

- Beds must be made daily.
- All bedrooms and bathrooms must be cleaned daily.

- All linen must be changed for new guests and bathroom linen must be changed every three days or on request.

#### **4. Summary**

This theme relayed the importance of well-planned décor and design for hospitality establishments and provided the basic requirements for star rating by the TGCSA.



# Tourism and local attractions

*Johan Hattingh*

## 1. Introduction

As the tourism and hospitality industries are inextricably linked it is imperative that especially accommodation establishments should be well-informed about local cuisine and attractions. Attractions are one of the pillars of the tourism industry and can serve as a motivation for tourists to visit a particular destination. It is therefore essential that tourist attractions should be well-maintained, affordable, interesting and adequately marketed. To enhance visitors' experience of a particular attraction, qualified tourist guides should be used to impart expert knowledge.

Apart from the importance of using tourist guides, it is essential that tourism product owners in the hospitality industry should have adequate knowledge and a keen interest in the tourist attractions of local areas. The product owners are the people who come into direct contact with the tourist and are also often the first point of contact for information about a specific area. Although social media and web searches could be used in locating relevant information, personal interaction with hospitality staff remains a fast and effective way of acquiring information about local attractions and amenities.

Enquiries are also likely to extend to available restaurants, pubs, arts and crafts establishments and other places of interest. Thus, it is imperative that staff at accommodation establishments is adequately informed about these matters. The aim of this theme is to suggest strategies through which the knowledge of hospitality staff can be enhanced in order to provide a more comprehensive customer service to tourists.

## 2. Strategies to enhance the knowledge of staff at accommodation establishments

A tourism product could be described as a combination of many components, attractions, and facilities, and the accessibility thereof. The components of a tourist product differentiate between natural and man-made attractions. Natural attractions can include beaches, marine areas, parks, conservation areas, and flora and fauna. Man-made attractions include archaeological and historical sites, distinctive cultural patterns, arts and crafts, and museums. The visitor can be a business and/or leisure tourist, each with different needs regarding the environment they find themselves in.

The business tourist is generally more interested in the amenities associated with the accommodation and the opportunity it creates for rest and recuperation, whereas the leisure tourist is likely to be interested in the ancillary facilities and amenities available in the vicinity. For the leisure tourist, tourist attractions provide the opportunity of visiting areas outside of the sphere of the accommodation establishment. In many instances it is also these tourist attractions which are responsible for the leisure tourist making use of the accommodation establishment. The accommodation establishments and the tourist attractions thus complement each other.

There are a number of ways in which the employees of accommodation establishments can become well-informed about local attractions and related tourist information. These include:

- familiarisation trips;
- SA Specialist programme;
- tourist guides;
- the role of the local tourism information centre or visitor information centre;
- information days by tourist attractions;
- belonging to accommodation associations and making sure that the organisation has training programs on a regular basis;
- regular tourism awareness programs;
- interacting with the provincial tourism department;
- dedicated tourism information person at the workplace;
- information sharing at the workplace.

### 2.1 Familiarisation trips

A familiarisation trip is one offered by a supplier or tourism product to travel agents/tour operators/media to introduce and experience the product. A familiarisation trip, or “fam trip”, as it’s colloquially known, needn’t only be for the groups mentioned above, but can also be undertaken by anyone in the tourism industry wanting to enhance their knowledge of local attractions. To further strengthen the case for the familiarisation trip, the following practical examples can be implemented.

A local accommodation establishment can make use of the familiarisation trip for their employees by organising excursions to local tourist attractions, restaurants, pubs or other spots of interest. It speaks for itself that the managers/owners of these sites must agree to the terms of the familiarisation trip. Usually the terms include a reduced or even waived entry fee to an attraction. Sites that allow such trips can organise something unique for the attendees to assist them in experiencing what the site has to offer. A true interest in the sites to be visited is important if a familiarisation trip is contemplated.

### 2.2 SA Specialist programme

Moving a bit wider than local attractions, many customers might not only enquire about local attractions but also have questions about provincial and national attractions. For many front line personnel, general knowledge about South Africa, its history or geography can be a challenge, as they might not have been exposed to this type of information. The SA Specialist programme is a programme supported by South African Tourism specifically aimed at improving the landmark knowledge of people in the South African tourism and hospitality industry. It is offered as an online course where users register and participate by downloading the necessary material.

An online test must be completed and a mark of 80% or more per module must be obtained before a participant can commence to the following module. After successful completion of the course, a certificate is issued. The course can be completed at a comfortable pace, suiting the needs of participants in terms of time. This method of acquiring knowledge does not impact on the day-to-day activities of an employee at the workplace, is presented free of charge and bears the stamp of approval from SA Tourism.

For more information go to <http://saspecialist.southafrica.net/za/en#about>

### 2.3 Tourist guides

The role and importance of tourist guides are usually overlooked. Tourist guides are knowledgeable about many aspects pertaining to the history and geography of a particular area. They are prominent reservoirs of knowledge that can provide relevant and interesting information to tourists. Tourist guides should also have expert knowledge pertaining to local sites like restaurants, pubs, clubs and other interesting sites. They should be able to provide information on and directions to the various points of interest. Tourist guides should build up a repertoire of trustworthy networks that can enable them to make informed referrals to tourists. Tourist guides are thus a good source of intimate tourism knowledge.

Accommodation establishments can make use of tourist guides to take personnel on guided tours of a specific area. Where staff of accommodation establishments is taken on a tour of various attractions, it is imperative that the tour should have an educational component. This can include a quiz after the tour to ascertain whether learning took place. Apart from leading to healthy competition between personnel it can also be advantageous to staff morale. The educational aspect of a tour led by a tourist guide should not be underestimated and the value added to the knowledge personnel will gain by attending such a tour, is an important factor to take into consideration.

### 2.4 The role of the local tourism information centre or visitor information centre

The local tourism information centre or visitor information centre plays an important role in the dissemination of information in towns and cities. The employees of the information centre usually have a wealth of knowledge about tourism products in the particular region. Tourism product owners should use this knowledge to their advantage. Inviting the personnel of an information centre to do presentations about the tourism products in their respective areas can be a good opportunity to gain the necessary knowledge about the area.

Although it is not firsthand experience, as can be obtained from the tourist guide, this method is more cost-effective, as no travelling is necessary and employees don't have to leave the establishment to view tourist attractions. A good PowerPoint presentation by the tourist office can provide the necessary information for acquiring knowledge about the tourism region in question. It is suggested that some form of competition (like a quiz between staff) should be built into this activity to entice employees to listen attentively and to learn and apply the knowledge they have gained.

## 2.5 Information days by tourist attractions

A number of tourist attractions have “open days” where interested parties are invited to visit the attraction and experience it firsthand. This approach could be a deliberate effort on the part of the attraction to broaden its reach and attract more visitors. This method can also be used by accommodation establishments as an alternative to the methods already mentioned. If the personnel have experienced the attractions, they will be better equipped to provide detailed information about it. It is thus necessary for the owners/managers of accommodation establishment to have a good report with the tourist attractions in their regions. It is also imperative that not only owners/managers visit the attractions but also personnel at all levels of the establishment.

## 2.6 Affiliation to relevant accommodation/tourism associations

Affiliation to local and regional tourism associations is of utmost importance for accommodation establishments to keep abreast of the latest tourism information. Tourism associations generally provide updated information to their members on a regular basis. According to the *South African tourism planning toolkit for local government (2009)* and the *Development and promotion of tourism in South Africa white paper (1996)*, tourism associations are an important role player in the growth and development of tourism.

Information from national government is filtered through to the tourism associations and from there to the members on ground level. If product owners do not belong to the local tourism associations, the provision and flow of information is not likely to reach them. It is also not only tourism information from local and provincial government that is distributed through the tourism organisations, but also new tourism product owners who want to make members aware of their product.

## 2.7 Regular tourism awareness programs

Tourism awareness programs are often presented by local, regional or provincial tourist offices. It is important to keep an eye on newspapers and social media for occasions where tourism awareness programs are being offered. Attending these programs can enlighten attendees on new tourism offerings in the region, new theoretical developments in the field, and new tourism development sites or attractions that are being planned. Usually tourism awareness programs are organised by the local tourism office or provincial tourism department, which emphasises the importance of belonging to a tourism association.

## **2.8 Interacting with provincial tourism department**

The provincial tourism departments are responsible for marketing and developing tourism in their respective provinces. It is worthwhile for accommodation establishments to interact with their respective tourism departments to obtain information about future tourism developments. It is usually difficult to be in contact with the provincial tourism department if they don't have a good communication strategy and maintain channels to share information with product owners. It is therefore important for tourism product owners themselves to contact the relevant tourism departments on a regular basis to stay informed.

## **2.9 Dedicated tourism information staff in the workplace**

Not all staff at accommodation establishments is equally interested in providing information to tourists. Therefore it's necessary that an establishment nominate an employee – preferably two – to act as tourism ambassadors to whom all enquiries can be directed. It is advisable that a single person is continuously available to assist tourists with their information needs; this explains the two personnel to be appointed as tourism ambassadors, as it streamlines a coordinated effort on the part of the establishment.

## **2.10 Sharing information in the workplace**

Communication is a key component to successfully running a business. Management must make sure that any new information about tourist attractions in their area is shared with all employees. This is likely to assist with the dissemination of information to tourists. New tourism information must be shared with staff on a regular basis. This can be done during the weekly staff meetings or through written communication on notice boards, social media and e-mails.

## **3. Summary**

Tourists that visit a particular destination generally require a host of specific information about the region and its attractions. As tourists usually make use of accommodation establishments, they are likely to direct their enquiries at staff. It is therefore important that staff at accommodation establishments are well-informed regarding tourist attractions and other related products and services in the area. This theme provided some strategies accommodation establishments can employ to enhance the knowledge of staff related about local offerings.

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## Biographic notes

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**Jeanine Nothnagel** joined the UFS in 1984 after obtaining the degree B.Com Human Resources Management. She obtained a master's degree in Human Resources Management in 1989 while working as a research assistant in the Department of Sociology at the UFS. She worked in the private sector from 1990 until 2002 for companies like Old Mutual, Media24 and Saambou Bank. In 2003 she joined the UFS again as lecturer in Sociology. From 2006 she was the community service learning coordinator for this faculty, until she joined the CUT on 1 July 2010 as lecturer in Tourism Management. As lecturer she specialises in the subjects Marketing, Human Resource Management, Strategic Management and Postgraduate Supervision.

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*The hospitality industry fulfils an important role in providing a variety of products and services to paying customers. This incorporates the offerings of the industry as a whole, which ranges from the provision of food and beverage to accommodation, and informing tourists of local attractions and events. Due to the demanding and service-oriented nature of the hospitality industry, it is imperative that the owners and managers of these establishments are adequately informed regarding the managerial and operational challenges they will face.*

*The aim of this book is to provide a practical introduction to a variety of components that can contribute to the success of hospitality establishments. The practical nature of the book is valuable for all types of hospitality establishments, including guest houses, lodges, B&B's, restaurants, bars and hotels. The book is divided into the following themes:*

- Theme 1: Human resources management*
- Theme 2: Front and back office management*
- Theme 3: Financial controls and budgets*
- Theme 4: Food service control systems*
- Theme 5: Beverage management*
- Theme 6: Health, safety and hygiene*
- Theme 7: Culture, religion and food rituals*
- Theme 8: Protocol and etiquette*
- Theme 9: Design and décor considerations*
- Theme 10: Tourism and local attractions*

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### **About the editor**

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