



PREPARED BY



Achieving the best food standards at the right price



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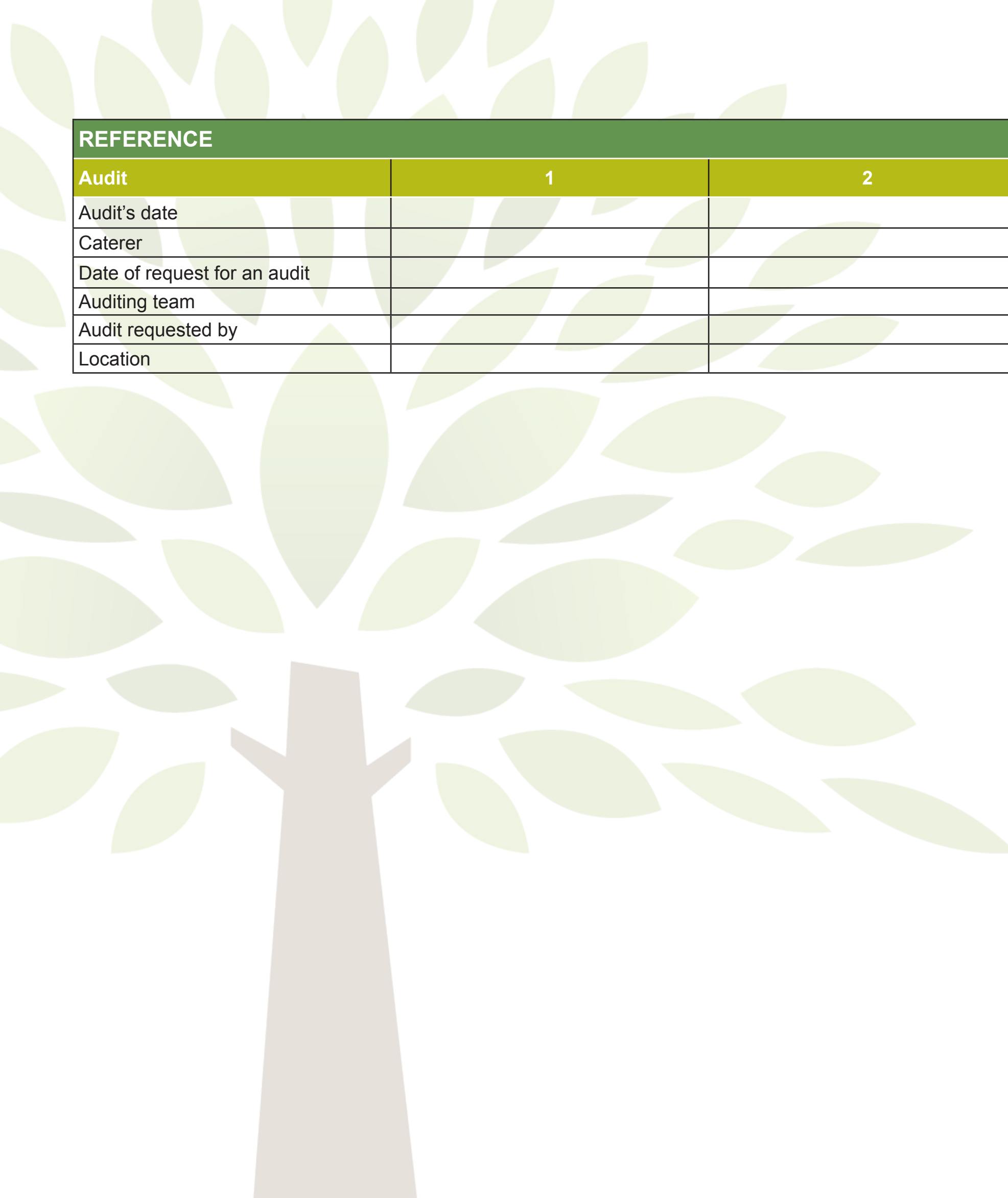


Financial Performance Summary
Financial Performance



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REFERENCE				
Audit	1	2	3	4
Audit's date				
Caterer				
Date of request for an audit				
Auditing team				
Audit requested by				
Location				

Audit Summary

Key performance areas that are performing well

Areas of concern that need to be addressed

SERVICE REVIEW SUMMARY						
Location						
Audited Area		Actual score	Potential Score	%	Rating	
★	Quality	0	375	0%	●	
👥	Nutrition	0	690	0%	●	
£	Food hygiene	0	390	0%	●	
👤	Health & Safety	0	230	0%	●	
	Total	0	1,685	0%	●	
+	Customer Survey	0	675	0%	●	
🍴	Financial Performance	0	545	0%	●	
🕒	Business Planning	0	500	0%	●	
	Total	0	1,720	0%	●	
				Key to ratings		
				80-100%		***
				60-79%		**
				40-59%		*
				< 40%		●

QUALITY - SUMMARY

	Location					
	Audited Area	Actual Score	Potential Score	%	Rating	Action Taken
Quality 1/8	Food Production & Menu Planning & Purchasing	0	80	0%		
Quality 2/8	Dining Area & Server Appearance	0	120	0%		
Quality 3/8	Food Service	0	85	0%		
Quality 4/8	Desserts & Sundries	0	35	0%		
Quality 5/8	Beverages & Fluids	0	20	0%		
Quality 6/8	Catering Staff & Management	0	115	0%		
Quality 7/8	Portion Control	0	75	0%		
Quality 8/8	Kitchen Maintenance & Equipment	0	70	0%		
	Total	0	375	0%		

Key to ratings	
80-100%	***
60-79%	**
40-59%	*
< 40%	•

QUALITY 1/8						
	Date Time					
			Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Suppliers & purchases	Checks in place to ensure the care/nursing home is achieving the best prices?	0	5		
		Checks in place to ensure the care/nursing home is buying the correct ingredients?	0	5		
		Annual supplier pricing checks?	0	5		
		Introduction of. new products each 4 week menu cycle?	0	5		
	Food Production	Menu planning with recipes?	0	5		
		Planned preparation time?	0	5		
		Recipes with ingredients recorded?	0	5		
		Cooking methods recorded?	0	5		
		Current cooking methods?	0	5		
		Use of fresh products and homemade menu items?	0	5		
	Kitchen Planning	Food storage and rotation?	0	5		
		Preparation planning?	0	5		
		Best use of the catering team?	0	5		
		Development and training of catering team?	0	5		
		Current job descriptions and catering skills should be reviewed?	0	5		
		Current catering structure needs to be reviewed?	0	5		
		Sub Total	0	80		

QUALITY 2/8



Date
Time

			Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Menus	Weekly & daily with descriptions are available and displayed?	0	5		
		All menus professionally created and displayed correctly?	0	5		
		Healthy options highlighted?	0	5		
		Evidence of seasonality?	0	5		
		Each services menus breakfast, lunch and dinners communicated?				
		Weekly menus advertised on care/nursing home websites?				
	Plate Service	Clean, well presented and sufficient content for demand?	0	5		
		Correct portion sizes displayed in kitchen?	0	5		
		Correct service equipment being used?	0	5		
		Professional presented and appearance for kitchen & overall organisation?	0	5		
		Evidence of awareness of environmental issues?	0	5		
	Servery	Floors generally clear, checked regularly through service?	0	5		
		Spillages dealt with immediately & correctly?	0	5		
		Tables cleared and cleaned regularly?	0	5		
		Floor, tables & chairs deep cleaned regularly?	0	5		
		Any repairs required and scheduled for repair or replacement?	0	5		
	Clearing Trolleys & Counter	Trolleys cleared regularly and in clean condition?				
		Sufficient in number?				
		Are they regularly maintained?				
		Are they correctly sited?				
		Trays clean & dry?				
	Condiments, Crockery & Cutlery	Napkins & Table Clothes are available & sufficient numbers?				
		Cutlery clean? Cutlery sufficiently stocked?				
		Correct Crockery and Drinking Cups available and sufficient numbers?				
		Sub Total	0	120		

QUALITY 3/8							
	Date Time						
				Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Starter	Soup	Relevant items & accompaniments	0	5		
		Alternative	Balanced and variety	0	5		
		Breads	Appropriate garnishing	0	5		
	Main	Breakfast	Appropriate range as per menu available within reason	0	5		
		Mid morning break	Appropriate range as per menu available within reason	0	5		
		Lunch	Appropriate range as per menu available within reason	0	5		
		Afternoon break	Appropriate range as per menu available within reason	0	5		
		Dinner	Appropriate range as per menu available within reason	0	5		
		Supper	Appropriate range as per menu available within reason				
	Vegetarian	Lunch	Appropriate garnishing	0	5		
		Dinner	Is the offer seasonable	0	5		
	Vegetables	Lunch	At least one fresh vegetable	0	5		
		Dinner	Choice of potatoes	0	5		
	Overall Impression	Lunch	Acceptable waiting time throughout	0	10		
		Dinner	Colourful, balanced and well presented	0	10		
			Sub Total	0	85		

QUALITY 4/8							
	Date Time						
				Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Dessert		Appropriate range as per menu available within reason	0	5		
			Home Baking balanced and variety	0	5		
			Appropriate garnishing	0	5		
	Yoghurt		Appropriate range as menu available within reason	0	5		
			Balanced and variety	0	5		
	Fresh Fruit		Appropriate range as per menu available within reason	0	5		
			Balanced and variety	0	5		
			Sub Total	0	35		

QUALITY 5/8							
	Date Time						
				Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Beverages		Appropriate range as menu available at all times	0	5		
			Cold drinks at correct temperature	0	5		
			Healthier options available i.e. waters, fresh juices	0	5		
			Correct labelling	0	5		
			Sub Total	0	20		

QUALITY 6/8							
	Date Time						
				Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Kitchen Team		Well trained to appropriate levels	0	5		
			Smart & clean uniforms inc. headwear	0	5		
			Organised	0	5		
			Development plans operating for each member of the team?	0	5		
			Appropriate footwear	0	5		
	Service Care Team		Well trained, smiling, eager to please	0	5		
			Smart & clean uniforms inc. headwear	0	5		
			Appropriate footwear	0	5		
			No jewellery	0	5		
			Knowledge of menu items & portion sizes	0	5		
			Name badges worn	0	5		
	Catering Management		Well trained to appropriate levels	0	5		
			Good communication skills	0	5		
			Smart & clean uniforms	0	5		
			Management of facility during service periods	0	5		
			Office management in evidence	0	5		
			Organised	0	5		
	Support		Visitation schedule in evidence	0	5		
			Business plan adhered to	0	5		
			Regular management meetings/contact	0	5		
			Additional support from specialists	0	5		
			Residents are priority	0	5		
			Well managed catering site	0	5		
			Sub Total	0	115		

QUALITY 7/8							
	Date Time						
				Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Kitchen Team	Breakfast		0	5		
		Mid morning break		0	5		
		Lunch		0	5		
		Afternoon break		0	5		
		Dinner					
	Service Team	Breakfast		0	5		
		Mid morning break		0	5		
		Lunch		0	5		
		Afternoon break		0	5		
		Dinner		0	5		
	Catering Management	Breakfast		0	5		
		Mid morning break		0	5		
		Lunch		0	5		
		Afternoon break		0	5		
		Dinner		0	5		
			Sub Total	0	75		

QUALITY 8/8 Kitchen Maintenance & Equipment							
	Date						
	Time						
				Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Kitchen	Refrigeration		0	5		
		Temperature Probe		0	5		
		Service Equipment		0	5		
		Storage Containers		0	5		
		Hot Water Boilers		0	5		
		Skirting Boards		0	5		
	Equipment	Trays		0	5		
		Crockery		0	5		
		Catering Staff Canging Room		0	5		
		Plate Covers		0	5		
		Plastic Glasses		0	5		
		Menus Boards & Holders		0	5		
		Cleaning Materials Store		0	5		
		Bed Trays		0	5		
			Sub Total	0	70		

NUTRITION & MENU PLANNING



Date

Time

Key to ratings

80-100%

60-79%

**

40-59%

*

< 40%

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Nutrition & Menu Planning		Actual Score	Potential Score	%	Comments & Corrective Actions	Actions Taken
A	Menu review and analysis	0	40	0%		
B	Management and staff training in nutrition	0	40	0%		
C	Nutritional policy development and review	0	40	0%		
D	Menu planning and food group meeting the needs of older people	0	40	0%		
E	Review the menus and ensure they're based on homemade, familiar, well known dishes, which the residents will recognise and enjoy, as well as meeting all the best practices, standards and providing all the necessary nutritional requirements specified in the Scottish Nutrients Standards for Nursing Homes.	0	40	0%		
F	Ensuring the menu can provide high energy and protein choices and dishes that lend themselves to becoming healthy dishes	0	40	0%		
G	To ensure best practice and as the residents are in a nursing home environment.	0	40	0%		
H	Do the catering staff have an understanding of the recommended portion sizes?	0	40	0%		
I	Tor Nursing Home Nutritional Care Plan	0	40	0%		
1	Has the nutritional care plan been communicated to the catering staff?	0	10	0%		
2	Healthy Eating - the eat well plate is this being operated by the catering staff?	0	10	0%		
3	Do the catering staff understand what the eat well plate principles and is this discussed with the care staff and nursing teams?	0	10	0%		
4	Healthy Eating for the elderly is this understood and communicated to the catering staff?	0	10	0%		
5	Has the catering team been trained in nursing home catering and as part of this training have they been given and trained in Case Studies?	0	10	0%		
6	Are nutrition issues communicated to the catering staff making sure residents achieve and maintain good nutritional status is essentialfor good quality care?	0	10	0%		
7	Are the catering team following the national guideline for Food in Hospitals, Food, Fluid and Nutritional Care in Hospitals and National Care Standards forCare Homes and Older People?	0	10	0%		

Nutrition & Menu Planning		Actual Score	Potential Score	%	Comments & Corrective Actions	Actions Taken
J	Do the catering team have an understanding of malnutrition?					
1	Do the catering staff have an understanding of assessment and identification?					
2	Do the catering staff have an understanding of Screening?					
3	Would the catering staff have an understanding of MUST screening?					
4	National care standards - insist that all residents should have there nutritional status assessed and reviewed regularly does the catering staff know and understand this?					
5	NICE - SHOULD BE SCREEENED ON ADMISSION DOES THE CATERING STAFF UNDERSTAND THIS?					
K	Complications & Effects do the catering staff understand and is this communicated to them by the nursing staff?					
L	Feed Issues					
1	Do the catering staff understand Dysphagia					
2	Texture modification					
3	Personal preferences					
4	Social aspect of eating together					
5	Food and snacks being available when residents are hungry					
6	Respect and dignity when being fed?					
7	Staff and residents at meals times do the catering staff understand that they should not enter the dining rooms at meal times.					
8	Do the catering staff understand the importance of familar tastes					
9	Do the catering staff understand standard terminology for texture modification A,B,C,D,E and Normal.					
10	Do the catering staff understand what food to avoid?					
M	Have the catering staff been trained in Fortified Diets?					
N	Is there a system for medication and diets in place ?					
O	Do the catering staff have an understanding of feeding solutions?					
P	Record Keeping					
Q	How do the catering team fit into the care planning?					
		0	690			

FOOD HYGIENE 1/5

	Date Time						
					Potential score	Actual score	Actions Taken
	Policy Statement	a	Policy statements on display on staff notice board	0	5		
		b	Food allergy information available	0	5		
		c	Genetically modified foods statement available	0	5		
	EHO Audit	a	Self hygiene audit completed	0	5		
		b	Copy of EHO letters, report etc available	0	5		
	Caterers Principals	a	Food Hygiene principles adhered to	0	5		
		b	Are in-house documents completed	0	5		
		c	Assessments reviewed at least annually/or major change	0	5		
		d	Sheets match current menu	0	5		
		e	New assessments created where necessary	0	5		
	Food Delivery	a	No non nominated suppliers used	0	5		
		b	Chilled/frozen deliveries packed away immediately	0	5		
		c	Date codlings and damage check carried out	0	5		
		d	Use by dates transferred to containers	0	5		
	Storage Disciplines	a	Food not retained in open cans/card containers	0	5		
		b	No risk of cross contamination from nuts during storage	0	5		
		c	No food found beyond its "best before" date	0	5		
			Total	0	85		

FOOD HYGIENE 2/5							
	Date						
	Time						
		Food Hygiene		Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Refrigeration & Freezer Storage	a	No out of date or "unfit" high risk food	0	5		
		b	Chilled stored at +5 degs. Or colder	0	5		
		c	Frozen foods stored at -18 degs. Or colder	0	5		
		d	Defrosting of foods in refrigerator	0	5		
		e	No freezing of homemade products and policy adhered to	0	5		
		f	Multi product storage avoids cross contamination	0	5		
		g	Clean containers used	0	5		
		h	Short-life date coding of foods	0	5		
		i	No outer packaging present	0	5		
		j	All "open" foods kept wrapped	0	5		
	Temperature Control	a	Probe available & working with breakdown policy	0	5		
		b	Probe sanitising wipes available & in use	0	5		
		c	Probe self calibration in evidence	0	5		
		d	Delivery of produce	0	5		
		e	Refrigerators and freezers	0	5		
		g	Refrigerator/freezer high temperature action policy	0	5		
		h	Cooked foods to core temperatures	0	5		
		j	Reheat records to 82 degs. Plus	0	5		
		k	Hot food displays at min.63 degs.	0	5		
		l	Low temperature policy	0	5		
		m	Temperature monitoring samples available in refrigeration	0	5		
		n	Left over cold food reuse if displayed under 5 degs.	0	5		
			Total	0	110		

FOOD HYGIENE 3/5



Date
Time

		Food Hygiene		Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Sanitation	a	Adequate supplies & in regular use with paper towels	0	5		
		b	Detergent sanitizer used in dish wash & manual washing	0	5		
	Cross Contamination	a	Staff practices avoid cross contamination	0	5		
		b	Is there an egg policy in operation?	0	5		
	Food Preparation	a	Prepared in under 2 hours both hot & cold	0	5		
		b	No un controlled pre-cooking/reheating evident	0	5		
	Food Service	a	Time delays between prep & service short	0	5		
		b	Hot food maintained above 63 degs	0	5		
		c	Cold food refrigerated between prep. & service	0	5		
		d	Cold displays at max 8 degs. Or 4 hour rule followed	0	5		
		e	Food not exposed to cross contamination whilst displayed	0	5		
		f	Unused foods able to be re used chilled & managed	0	5		
		g	When food is cooled is it stored at 5 degs max?	0	5		
		h	Left over meat/fish not used in other made up dishes	0	5		
		i	All wastage recorded	0	5		
			Total	0	75		

FOOD HYGIENE 4/5							
	Date						
	Time						
		Food Hygiene		Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Foreign Materials in Food	a	Glass/crockery breakage procedure understood & records	0	5		
		b	No broken or chipped glassware evident in food rooms	0	5		
		c	Any loose fittings, nuts, bolts etc seen or rubbish in drawers	0	5		
		d	No crude ousters on food prep surfaces	0	5		
		e	Approved staff jewellery only worn	0	5		
		f	Suitable head coverings for all staff	0	5		
		g	Wire wool, brillo pads, etc avoided	0	5		
		h	Complaint procedure understood & operated	0	5		
	Cleanliness	a	Written cleaning schedule in place & operating	0	5		
		b	Sign off check system in place re above	0	5		
		c	Cleaning chemicals & equipment stored properly	0	5		
	Food Preparation	a	Floors & wall/floor junctions	0	5		
		b	Walls inc. high level	0	5		
		c	Ceilings inc fittings	0	5		
		d	Ventilation canopy, ducting and filters	0	5		
		e	All Cooking equipment	0	5		
		f	Food preparation surfaces & can opener	0	5		
		g	Inside fridges & freezers	0	5		
		h	Food slicer & other "high risk" equipment	0	5		
		i	Preparation utensils inc. chefs knives	0	5		
		j	Sink units & wash hand basins	0	5		
		k	Food storage areas	0	5		
		l	Coffee and beverage machines/cups and crockery	0	5		
			Total	0	115		

FOOD HYGIENE 5/5



Date
Time

		Food Hygiene		Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	Staff Personal Hygiene	a	Washing hands regularly	0	5		
		b	Bactericidal soap at all hand basins	0	5		
		c	Plugs at basins	0	5		
		d	Disposable towels at all basins	0	5		
		e	Clean uniforms with proper storage	0	5		
		f	No open wounds or sores	0	5		
		g	No chewing gum or eating in kitchen.	0	5		
		h	Food tasted with clean spoon	0	5		
		i	Food Handlers declaration completed by all staff	0	5		
		j	Return to work procedure in place & operated	0	5		
		k	Alleged food poisoning reporting system in place	0	5		
	Maintenance & Pest Control	a	Defect reporting system in place & managed	0	5		
		b	All preventative pest control measures in place	0	5		
		c	No active infestation	0	5		
		d	Refuse area clean and tidy	0	5		
	Hygiene Training Records	a	Manager trained to REHIS/CIEH intermediate or equivalent	0	5		
		b	Chef/2nd trained to REHIS/CIEH intermediate or equivalent	0	5		
		c	All Staff received full induction training	0	5		
		d	Kitchen staff received appropriate training in last 6 months	0	5		
		e	All casuals/agency trained to appropriate levels	0	5		
		f	All training records organised & available	0	5		
			Total	0	105		
				0	390		

HEALTH & SAFETY 1/3							
	Date						
	Time						
		Health & Safety		Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	1	a	Policy statements on display on staff notice board	0	5		
		b	H & S law poster completed & displayed	0	5		
	2	a	Management training carried out	0	5		
		b	Induction training for staff/casuals/agency	0	5		
		c	General H & S training carried out every 6 months	0	5		
		d	Risk assessment & safe system of work training complete	0	5		
		e	Regular training for all other activities	0	5		
		f	Training record cards available & signed by staff member	0	5		
	3	a	Regular staff meetings with HSE as agenda item	0	5		
		b	Minutes & records from meetings actioned	0	5		
	4	a	Generic assessments reviewed annually by Manager	0	5		
		b	All site specific risks identified and assessed.	0	5		
	5	a	First Aiders available	0	5		
		b	Sufficient first aid boxes & checklist completed	0	5		
	6	a	Are all accidents logged?	0	5		
		b	Company reporting procedure followed?	0	5		
		d		0	5		
			Total	0	85		

HEALTH & SAFETY 2/3



Date
Time

		Health & Safety		Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	7	a	List of chemicals used is available	0	5		
		b	COSHH safe system of work completed for ALL chemicals	0	5		
		c	Safety data sheets provided for all chemicals used	0	5		
		d	COSHH assessments available & used	0	5		
		e	Are bulk chemicals stored safely & notice displayed?	0	5		
		f	Are all decanted chemicals properly labelled?	0	5		
		g	Assessment of PPE provision carried out	0	5		
		h	Monthly check on PPE completed	0	5		
		i	PPE available, clean & not contaminated	0	5		
	8	a	Are PAT tests carried out & current records kept available?	0	5		
		b	Faulty or dangerous appliances found during audit?	0	5		
		c	Are all earth bonding wires in kitchen in place?	0	5		
		d	Microwave ovens leakage testing annually?	0	5		
	9	a	Formal risk assessments for manual handling tasks?	0	5		
		b	Safe systems of work in place during audit?	0	5		
		c	Equipment available for heavy loads?	0	5		
		d	Heavy items not stored at head height or above	0	5		
	10	a	Staff ALL wear Safety shoes	0	5		
		b	Excellent housekeeping standards re tripping hazards	0	5		
			Total	0	95		

HEALTH & SAFETY 3/3							
	Date						
	Time						
		Health & Safety		Actual Score	Potential Score	Comments & Corrective Actions	Actions Taken
	12	a	Fire risk assessments present & key risks identified	0	5		
		b	Points from fire risk assessment actioned	0	5		
		c	All staff received fire training in the current 6 months	0	5		
		d	All staff involved in a planned evacuation in the last 6 month	0	5		
		e	Are all alarms recorded & copies kept	0	5		
		f	Gas and Electricity cut-offs clearly marked?	0	5		
		g	Extinguishers properly in situ & in date?	0	5		
		h	Are all combustibles stored safely?	0	5		
		i	Catering staff smoking policy in place and adhered too?	0	5		
		j	Are all fire escapes clear, in good order & no wedges in use	0	5		
			Total	0	50		
			Overall Total		230		



CUSTOMER SURVEY - SUMMARY

Location

Audited Area

Actual score

Potential Score

%

Rating

Dining room ambience

0

75

0%

•

Communication

0

150

0%

•

Service

0

675

0%

•

Taste & temperature of products

0

100

0%

•

Presentation

0

125

0%

•

Total

0

1,125

0%

•

Key to ratings

80-100%

60-79%

**

40-59%

*

< 40%

•



CUSTOMER SURVEY

CUSTOMERS

[illegible]

[illegible]



FINANCIAL PERFORMANCE - SUMMARY

Location				
Audited Area	Actual score	Potential Score	%	Rating
Suppliers Invoices	0	70	0%	•
Additional Costs	0	65	0%	•
Sales	0	30	0%	•
GP	0	35	0%	•
Labour Costs	0	30	0%	•
Expenses	0	15	0%	•
Trading	0	300	0%	•
Total	0	545	0%	•
			Key to ratings	
			80-100%	***
			60-79%	**
			40-59%	*
			< 40%	•

FINANCIAL PERFORMANCE 1/7



Date

Time

Supplier Invoices

1

How accurate are your monthly invoices?		Actual Score	Potential Score	Comments & Corrective Actions
1.1	Are agreed nominated suppliers being used?	0	5	
1.2	Has the client been informed of commodities price increases in the period per the budget?	0	5	
1.3	Is there evidence of competitive purchasing?	0	5	
1.4	Are all discounts being returned?	0	5	
1.5	Have overrider discounts or special offers been declared and reduced the budgeted costs?	0	5	
1.6	Have all sundry costs been accounted for correctly?	0	5	
1.7	Have all cleaning costs been accounted for correctly?	0	5	
1.8	Budgeted other costs have these been accounted for correctly?	0	5	
1.9	Does the catering costs agree with catering budget?	0	5	
1.10	Is vat charged correctly?	0	5	
1.11	Does the departmental cross charges agree with the income?	0	5	
1.12	What other income levels have been achieved that agree or not agreed within the catering budget?	0	5	
1.13	Are agency labour costs correct and correspond to attendance records?	0	5	
1.14	Is the catering achieving the budget?	0	5	
Sub Total		0	70	

FINANCIAL PERFORMANCE 2/7						
	Date					
	Time					
	Additional Costs					
2	Added to the cost of catering?		Actual Score	Potential Score	Comments & Corrective Actions	
	2.1	Cleaning Materials.	0	5		
	2.2	Non - Food Materials.	0	5		
	2.3	Uniform Laundry	0	5		
	2.4	Stationery & Back Office Stationery	0	5		
	2.5	Marketing	0	5		
	2.6	Procurement	0	5		
	2.7	Management Systems	0	5		
	2.8	Staff Meals	0	5		
	2.9	CRB Checks	0	5		
	2.10	Life Assurance for the catering employees	0	5		
	2.11	Training HSE	0	5		
	2.12	Client Employee Liability Insurance	0	5		
	2.13	Payroll	0	5		
		Sub Total	0	65		

FINANCIAL PERFORMANCE 3,4 / 7



Date

Time

Sales

3

Are all sales being captured and recorded accurately?		Actual Score	Potential Score	Comments & Corrective Actions
3.1	Is the Production Control System In place	0	5	
3.2	Hospitality sales being accurately recorded	0	5	
3.3	Actual monthly cost v target recorded and understood	0	5	
3.4	Overall costs v last quarter being monitored against budget	0	5	
3.5	Spend per head v last quarter being monitored against budget	0	5	
3.6	Effect of special event days/promotions recorded & analysed	0	5	
Sub Total		0	30	

GP

4

Are the profits recorded accurately?		Actual Score	Potential Score	Comments & Corrective Actions
4.1	Actual monthly gp % v target	0	5	
4.2	Actual monthly gp volume (£) v target	0	5	
4.3	Wastage v target and reasons	0	5	
4.4	Stock holding at 7 days.	0	5	
4.5	Menu production system in place	0	5	
4.6	Menu costings in place and accurate	0	5	
4.7	Stock sheets in place and accurate	0	5	
Sub Total		0	35	

FINANCIAL PERFORMANCE 5, 6, 7 / 7

	Date					
	Time					
	Labour Costs					
5	Are cost of labour calculated correctly?			Actual Score	Potential Score	Comments & Corrective Actions
	5.1	Actual monthly (£) V target (tba)		0	5	
	5.2	Actual labour % against monthly cost target (tba)		0	5	
	5.3	Turnover of supervisor/chef/management		0	5	
	5.4	Turnover of food service assistants/porters		0	5	
	5.5	% Agency against target labour (tba)		0	5	
	5.6	Holidays planned to limit financial exposure		0	5	
		Sub Total		0	30	
	Expenditure					
6	Are expenses calculated accurately?			Actual Score	Potential Score	Comments & Corrective Actions
	6.1	Actual monthly (£) V target (tba)		0	5	
	6.2	Actual expense % against monthly cost target (tba)		0	5	
	6.3	Any "one offs"		0	5	
		Sub Total		0	15	
7	Is trading calculated accurately?			Actual Score	Potential Score	Comments & Corrective Actions
	7.1	Actual net cost £ V targets for the quarter		0	100	
	7.2	Purchasing volumes £ V targets for the quarter (tba)		0	100	
	7.3	Cash flow £ V targets for the quarter (tba)		0	100	
		Sub Total		0	300	



BUSINESS PLANNING - SUMMARY

Location					
Audited Area		Actual score	Potential Score	%	Rating
Service		0	100	0%	•
Value		0	100	0%	•
Quality		0	100	0%	•
Integrity		0	100	0%	•
Innovation		0	100	0%	•
Total		0	500	0%	•
				Key to ratings	
				80-100%	***
				60-79%	**
				40-59%	*
				< 40%	•



BUSINESS PLANNING 1 / 5

Service

1		End Date	PERIOD															
	Initial Tasks <i>to be completed in first quarter</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Existing Tasks <i>to be completed in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Service Development Tasks <i>agreed to be introduced in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Key Task Objectives <i>to be achieved over the next year or into the future</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																5		
																5		
																5		
																5		
																5		
	Total score															0	100	
	Trading Periods		1	2	3	4	5	6	7	8	9	10	11	12	13			
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				



BUSINESS PLANNING 2 / 5

Value																		
2		End Date	PERIOD															
	Initial Tasks <i>to be completed in first quarter</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
																	5	
	Existing Tasks <i>to be completed in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Service Development Tasks <i>agreed to be introduced in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Key Task Objectives <i>to be achieved over the next year or into the future</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																5		
																5		
	Total score															0	100	
	Trading Periods		1	2	3	4	5	6	7	8	9	10	11	12	13			
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				



BUSINESS PLANNING 3 / 5

Quality

3		End Date	PERIOD															
	Initial Tasks <i>to be completed in first quarter</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Existing Tasks <i>to be completed in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Service Development Tasks <i>agreed to be introduced in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Key Task Objectives <i>to be achieved over the next year or into the future</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																5		
																5		
																5		
																5		
																5		
	Total score															0	100	
	Trading Periods		1	2	3	4	5	6	7	8	9	10	11	12	13			
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				



BUSINESS PLANNING 4 / 5

Integrity

4		End Date	PERIOD															
	Initial Tasks <i>to be completed in first quarter</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Existing Tasks <i>to be completed in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Service Development Tasks <i>agreed to be introduced in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Key Task Objectives <i>to be achieved over the next year or into the future</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required
																	5	
																	5	
																	5	
																	5	
																	5	
	Total score																0	100
	Trading Periods		1	2	3	4	5	6	7	8	9	10	11	12	13			
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				



BUSINESS PLANNING 5 / 5

Innovation

5		End Date	PERIOD																	
	Initial Tasks <i>to be completed in first quarter</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required		
																	5			
																	5			
																	5			
																	5			
																	5			
	Existing Tasks <i>to be completed in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required		
																	5			
																	5			
																	5			
																	5			
																	5			
	Service Development Tasks <i>agreed to be introduced in this budget year</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required		
																	5			
																	5			
																	5			
																	5			
																	5			
	Key Task Objectives <i>to be achieved over the next year or into the future</i>		1	2	3	4	5	6	7	8	9	10	11	12	13	Actual Score	Potential Score	Comments & Corrective Actions Required		
																	5			
																	5			
																	5			
																	5			
																	5			
	Total score															0	100			
		Trading Periods	1	2	3	4	5	6	7	8	9	10	11	12	13					
			Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec						



